Human Resource and Training Needs Assessment and Strategies Food Processing Sector Partnership

August, 2000

Final Report

THE Trimension™ GROUP

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Acknowledgements

The Saskatchewan Food Processing Sector Partnership wishes to express its appreciation to all the organizations, companies and individuals that have contributed time and effort to make this study possible.

This report would not have been possible without the participation of the individuals and companies who took the time to meet and speak to the researchers on various aspects of the Saskatchewan food processing industry, as well as those who responded to the survey questionnaires. These individuals came from business, industry, and government.

Members of the Steering Committee are to be commended for the time and effort they have contributed to the research and writing of this report.

This research was funded by Saskatchewan Post Secondary Education and Skills Training (PSEST) through the Sector Partnerships Program. The role of PSEST is gratefully acknowledged and, while PSEST was extensively involved in the study, the views expressed in this report are those of industry and industry stakeholders.

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Steering Committee Members

The following are the members of the Food Processing Sector Partnership Steering Committee. We would like to acknowledge the work of the Steering Committee members; their insights and guidance were much appreciated in the development of this report.

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EXECUTIVE SUMMARY

Working on behalf of the Food Processing Sector Partnership Steering Committee and with Saskatchewan Post Secondary Education and Skills Training, Trimension Group conducted research to identify the human resource and training needs of the food processing industry in the province and devise strategies for human resource and training planning.

INTRODUCTION

In order to develop and implement the most appropriate strategies for a proactive human resource plan, the Food Processing Sector Partnership undertook a needs assessment with food processors and employees to identify current and future human resource and training needs of the industry. This report presents the results of this research.

METHODOLOGY

The research undertaken involved both secondary and primary data gathering, followed by validation using industry representation by the members of the Steering Committee.

The following briefly describes the steps that were taken to complete the study and produce this report.

Literature Review

The literature review was completed with the objective of providing the Steering Committee with the necessary background information in order to establish the base for the human resource and training needs study. The literature for this report was limited to those publications dated 1991 to the present to ensure only current information was included.

Education and Training Database

Research was conducted to develop and establish a database of education and training programs for the Saskatchewan food processing industry. The database outlines both accredited and non-accredited education and training offered in Western Canada and Ontario and identifies the institution, program name, a brief description, length, method of delivery and contact information.

Survey

Trimension Group developed the survey instrument in consultation with the Food Processing Sector Partnership Steering Committee. Respondents were drawn from the Saskatchewan Food Processors Association directory. The sample was distributed to be representative of the industry in terms of size of company (number of employees) and location, in terms of rural and urban communities. Interviewers were instructed to speak to the general manager/owner or, where possible, the human resource or personnel manager. In total, 95 companies were surveyed.

The appropriate contact at large companies (20 or more employees) was called in advance to participate in the survey. Respondents were mailed a copy of the survey in order to prepare their responses. The purpose of these steps was to ensure a high completion rate.

NorSask Consumer Interviewing Services, a professional interviewing service in Saskatoon, was subcontracted to conduct the telephone surveys. Data was collected between March 3 and March 19, 1999. Data from the survey was analyzed by Trimension Group using *SPSS for Windows*, a statistical software package.

Industry Validation

Four focus groups were conducted between June and July 1999 as part of the validation of the survey results. The focus groups were conducted with industry members, both employers and employees, and were distributed to reflect the views of various components of the industry. The following is an overview of the composition of the focus groups.

Focus group 1: large, urban, employers	**Focus group 3**: small company, non-union employees
Focus group 2: small, rural, employers	**Focus group 4**: large company, union, employees

Summary of Findings

Food processing in Saskatchewan is primarily comprised of meat and bakery products, and prepared/specialty foods. Small, rural based businesses make up the majority of food processing companies in the province. 58% of companies surveyed were located in a community of less than 1,000 people and 81% were small processors with fewer than 20 employees. Most of the products made in Saskatchewan are sold in Saskatchewan, but 19% of food processors do export their goods.

Labourers, machine operators, butchers, bakers, sales representatives and administration managers are the largest occupations in the industry. With the exception of administration, all of these occupations and supervisory occupations are expected to grow in the next 5 years. Machinery operators are expected to grow the fastest at 36% over the next 5 years, and a forecasted 32% more butchers and 11% more bakers will be needed. Supervisors (19%), labourers (15%) and sales representatives (14%) are also expected to grow substantially.

The food processing workforce in Saskatchewan is typically young, well educated and more culturally diverse than the provincial averages. More people working in food processing are between the ages of 35 and 54 than in other industries. More people in food processing have completed high school than the provincial norm. Contributing to this trend is the tendency among large companies to look for a minimum high school education when hiring. While the provincial rate of Aboriginal employment in the province is 4%, in food processing it is 6%.

As many of the companies are small and rural, they find it difficult to attract workers to rural locations and are unable to offer wages competitive with larger companies. Large companies identified education and training as the main barriers to employment in the industry. This perspective is the result of the high level of technology used in large companies and the relatively high levels of education and training required to operate the equipment.

Large and small companies, rural and urban, indicated that turnover is not a problem in the industry. The overall turnover rate is 16%. Their reasons differed, however, depending on the size of the company. Small companies typically felt that a good work environment and family business atmosphere contribute to keeping turnover low. Large companies attributed high retention to high employee loyalty, good wages, light manual labour and shift flexibility. The most common reasons employees gave for leaving their jobs were better opportunities and wages elsewhere. An employee's motivation for leaving the Saskatchewan industry altogether was low pay and high taxes; many businesses felt employees are moving to more lucrative markets in Alberta and British Colombia.

Companies identified specific technical training needs within the industry. These include Hazardous Analysis and Critical Control Points (HACCP), ISO 9000, Food Handlers Safety, Statistical Process Control, Good Manufacturing Practice, computer literacy and safety. Industry prefers training delivered in-house using company resources. Employers ranked employees' employability skills quite high and indicated that in-house training is the best way of delivering employability skills training. Large companies have fewer difficulties delivering training to their employees as they have the financial resources to bring training to the workplace. Small companies, however, have difficulty finding the time or financial resources to attend training or send employees to training.

KEY FINDINGS

Company Information

- The most common business areas of companies were meat (37%), bakery products (16%), and prepared/speciality foods (13%).

- 58% of the companies surveyed are located in a rural community (less than 1000 people).

- 81% of companies surveyed are small processors (less than 20 employees) and 19% are large employers (20 or more employees). The average size of the smaller companies is 7 employees and the average size of the larger companies is 74 employees. In total, 564 people work for the smaller processors surveyed and 1,340 work for the larger processors surveyed for a total of 1,904 employees represented in this survey.

- 19% of food processors are exporting and export sales are an average of 52% of their total revenue. Notably, 51 (or 54%) of the 95 companies surveyed generate 100% of their sales here in Saskatchewan.

Employment Projections

- The five occupations with the largest number of employees include labourers in processing; machine operators and related workers; butchers and bakers; sales representatives; and administration managers. Companies expect growth in the next five years among machine operators and related workers (36%); butchers (32%) and bakers (11%); supervisors (19%); labourers in processing (15%); and sales representatives (14%).

Employee Profile

- In terms of age of employees, the food processing industry employs younger people compared to the provincial employed labour force. 76% of workers are in the 35 to 54 year age group compared to the provincial average of 52%.

- Over half of workers in the food processing industry (62%) have completed high school compared to 22% for the employed labour force in Saskatchewan.

- Persons with disabilities and women are underrepresented compared to provincial labour force statistics. 6% of workers are Aboriginal people compared to the provincial rate of 4% while 3% are visible minorities, which is equal to the provincial statistic.

Recruitment

- The requirement for "a good work ethic" emerged as the main barrier for potential employees in trying to get a job in the food processing industry.

- Half of companies agree that it is difficult to attract employees because of a rural location (54%) and because they are unable to offer competitive wages (51%).

- Most processors (87%) don't feel employee turnover is a problem for their company due to having a good work environment, offering competitive wages and benefits, loyal employees, and their company being a family business.

- For an estimated total of 1,904 people employed by the companies surveyed, 11% voluntarily left their jobs last year, while 3% were terminated, and 2% were laid off. The overall turnover rate was 16%.

- The most common reasons employees gave for leaving their jobs include leaving for better opportunities elsewhere (38%) and leaving for better wages elsewhere (36%).

- Companies reported few vacant and underskilled positions.

Skill Requirements and Training

- Skill areas where more training is needed for employees include: HACCP, ISO 9000, Research and Development (R & D), and scientific knowledge and skills.

- Skill deficiencies among owners/managers include ISO 9000.

- 70% prefer to provide industry-specific skills training in-house either using company resources or bringing in trainers.

- Overall, companies feel that employees are strong in employability skills. The areas with the lowest average ratings were communication skills and literacy/numeracy.

- 67% would prefer employability skills training delivered in-house either using company resources or bringing in trainers.

- Among employees, there are skill deficiencies in terms of exporting skills, computer skills, strategic planning, and law. Owners/managers are lacking computer skills and exporting skills.

- 41% prefer business skills training delivered by an external training provider, association, or accredited training body, while 41% prefer in-house training.

- The greatest barriers to training include: cost of taking people off the job (48%), and the cost of living expenses to employees while not working (48%), and lack of time (46%).

- In terms of the impacts of seasonality on training, companies commented on the costs of turnover in terms of retraining new employees and the challenge of scheduling training due to fluctuating production levels.

- 56% of companies anticipate that the impact of information technology (computers, automation, the Internet) will affect their organization, employees, and/or labour market requirements in the next 5 years. Information technology will have an impact on training in that employees will need to have computer skills. Marketing and advertising will also be affected in terms of new communication technologies. As companies use more automated processes in production, they may require fewer workers.

Training Options – Awareness and Assessment

- 55% (or 52 companies) provide training or upgrading to employees currently or have within the past three years.

- 38% (or 36 companies) provide internal training to employees using their own company trainers or employees. The main areas of internal training are job-specific training, machine operation, HACCP, food safety, orientation, and computers.

- 37% (or 35 companies) currently use training courses or programs provided by other training providers. Key areas of external training include computers, safe food handling, sanitation, HACCP, and business related topics.

- 55% of companies indicated they are willing to pay for training while 33% are not. 12% believe it depends on the situation. The willingness to pay for training depends on the benefits of the training.

- 23 companies were able to provide an estimate of the percentage of payroll spent on training. On average they allocate 5% of their payroll for training employees.

- 47% of companies stated that education and training programs in Saskatchewan meet their company's training needs, while 28% believe their needs are not being met. 25% are undecided or "don't know."

- There is a need for more awareness of what training is available for food processors in Saskatchewan, as well as improvements to meat cutting courses currently offered. There is also a need for baking training in Saskatchewan. Safe food handling, HACCP, and Occupational Health & Safety (OHS) also emerged as important areas.

- 77% of companies want direct access to information on food processing training. Among those who want more information, the preferred way to receive the information is by an industry newsletter or mail-out.

- 75% of companies want more information about the Food Processing Sector Partnership.

Recommendations

 # 1: *Develop a long-term strategy and provincial training team to address Saskatchewan food processing industry training needs.*

Objectives	Action Steps	Partners	Possible Timelines
1 Develop partnerships with stakeholders that represent industry, education & training providers, labour and government.	• Presentation of study • Communicating/disseminating information (develop communications strategy) • Increase dialogue between trainers & educators to develop mutual understanding of everyone's activities and plans • Identify sector partnership partners and what role each can play • Determine a suitable schedule of meetings for the sector partnership	SIAST Unions Regional Colleges Aboriginal institutions HRDC PSEST Universities SFPA Food Centre	Within next 6 months
2 Identify and develop courses to address short term needs.	• Work with representatives from various industries that make up the sector so they decide what courses, and approve course content. • Identify existing courses to meet those needs. • Determine applicability of those courses • Modify existing applicable courses	Prairie Swine Centre (possibly modify HR courses) SIAST Food Centre Industry associations Universities Unions	12 – 18 months
3 Identify and develop courses that are transferable within the sector to address long term needs.	• Identify common core needs. • Develop training to address training gaps. • Establish a system of Prior Learning Assessment Recognition for use by industry • Develop an evaluation process	Industry SFPA Food Centre SIAST Universities Industry associations SLFDB	Long term

4 Develop accreditation process that indicates a course is approved by industry and/or a post-secondary institution.	• Partner with SIAST to get approval/SIAST accreditation • Partner with universities • Partner with national industry associations • Gain approval from government (ie SaskHealth, SAF) • Develop a mechanism for employer/industry recognition	Industry SFPA SIAST Universities PSEST Provincial government SIIT DTI	Long term
5 Develop an evaluation process for short and long term training & education courses and programs.	• Work with trainers, educators and industry to develop & implement the evaluation process	SIAST SIIT DTI Universities SFPA Industry	Long term and on going

 # 2: *Develop an effective communication strategy to assist industry and individuals in assessing all food processing related training opportunities in the province.*

Objectives	***Action Steps***	***Partners***	***Possible Timelines***
1. Develop a communication process that provides information in a timely manner, is relevant to the industry, is readable and accessible and can be delivered in a cost effective manner.	• Make presentations to stakeholders/partners • Include information in newsletter and on website • Work with unions • Speak at conferences about training • Involve federal and provincial government • Make presentations to Aboriginal employment and training organizations • Make presentation to SLFDB and provincial government • Develop relationships with stakeholders with the	SIAST Universities Food Centre Regional Colleges Private trainers Unions/UFCW SFPA WD SECD SAF PSEST	Immediate: • Get information out in industry and government newsletters Long term • Develop strategies as the group works together

	goal of including them in the partnership • Ensure all stakeholders, especially industry, are aware of what's available and how they access it	Federal Government SaskHealth DTI SIIT	
2. Make industry aware of the value of investment in training.	• Gather and distribute testimonials • Develop industry training champion programs • Develop industry mentorship program where companies speak to other companies about what they learned and benefits provided to them. • Develop relationships with the media to enhance industry and training profile	Industry Training providers Unions SFPA Food Centre SLFDB	Short & long term
3. Update communication strategies on a regular basis.	• Develop a multi-party agreement to fund this update.	SFPA SECD Food Centre HRDC AFIF Industry	To be determined based on communications strategy (SFPA responsible)

4. Establish a process for organizing meetings with education and training providers to review and discuss the reports and training database.	• Conduct a meeting with education & training providers • Presentation of report at meeting • Discuss forming a provincial working group • Develop joint strategy	SIAST UFCW SFL U of S Extension U of R DTI SIIT Regional Colleges WD Industry Food Centre/SAF PSEST HRDC SECD SLFDB Business Development Bank of Canada	Short term (prior to end of June 2000)

 # 3: *Develop a funding strategy.*

Objective	***Action Steps***	***Partners***	***Possible Timelines***
1. Identify appropriate funding sources (SFPA to take the lead).	• Identify funding for design and development of training • Identify funding to help industry access training • Include funding agents in provincial training team • Develop a process to access funding • Communicate funding opportunities to industry via communications strategy	SAF PSEST HRDC CARDS	Short term and on-going

 # 4: *Create an environment that encourages the development, retention and recruitment of a skilled workforce.*

Objectives	***Action Steps***	***Partners***	***Possible Timelines***
1. Develop a marketing plan to promote career opportunities to youth, underemployed and unemployed in Saskatchewan and promote the industry to attract people from outside the province.	• Explore co-op and workplacement programs between industry and training providers • Integrate with present communication strategy • Educate government on the food processing industry	Universities SIAST Technical training providers SFPA Food Centre CSCES HRDC Aboriginal institutions Provincial government	Short term and on going
2. Encourage the industry to become more involved in promoting opportunities in the industry.	• Participate in career days, high school workplacement programs, junior achievement, and others • Develop partnerships between industry and education & training providers to work towards creating a positive work environment	Industry SFPA Training Providers High Schools SLFDB PSEST All Sector Partnerships	

 # 5: *Work to create a forum for all industries to work together.*

Objective	Action Steps	Partners	Possible Timelines
1. Develop a province wide approach to address Saskatchewan human resource and training needs.	• Approach SLFDB to co-ordinate a workshop to develop a provincial strategy.	SFPA UFCW SLFDB PSEST All Sector Partnerships Dept. of Education SLFDB	Long term

Next Steps

The Saskatchewan Food Processing Industry Sector Partnership has formulated an opportunity for future and ongoing human resource development and training through this project. The need for a long-term strategy to address the industry's training needs, along with effective communication strategies and creating an environment for development, retention and recruitment of a skilled workforce, are important aspects to undertake.

To begin the process to implement the recommendations and the objectives set by the Steering Committee, the industry and the Saskatchewan Food Processors Association must undertake the following steps:

1. The Saskatchewan Food Processors Association must organize a meeting with key stakeholder representatives and the education and training partners to enhance the Steering Committee so they can begin to priorize and develop strategies for implementing the objectives set forth in this report.

2. The members of the Steering Committee undertake initiatives to communicate the research findings to their representative members and organizations.

   It is noted the research and report has already been presented to the Board of Directors of the Saskatchewan Food Processors Association and to the affected locals of United Food & Commercial Workers Local 1400. The results have been the acceptance of the study by the Board of Directors of the Saskatchewan Food Processors Association and the two locals of United Food and Commercial Workers Union have submitted names of interested members to assist with Phase Two of the initiative.

3. The Saskatchewan Food Processors Association produce and distribute the results of the study using a variety of means to ensure coverage and communication to the industry.

4. The Saskatchewan Food Processors Association in co-operation with Saskatchewan Post-Secondary Education and Skills Training prepare a news release to announce the completion of the study and the next steps.

5. The enhanced Steering Committee to begin work with the Saskatchewan Labour Force Development Board to develop a province wide approach to address the human resource and training needs for Saskatchewan industries.

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1.0 Introduction

In order to develop and implement the most appropriate strategies for a proactive human resource plan for the industry, the Food Processing Sector Partnership undertook a needs assessment study with food processors to identify human resource and training needs of the industry. This report presents the results of this research.

2.0 Methodology

2.1 *LITERATURE REVIEW*

The literature review for this report was limited to those publications dated 1991 to the present to ensure only current information was included. The information from the literature review was presented to the Food Processing Industry Steering Committee for review and discussion. The results of the review and the input received from the Steering Committee formed the basis for the human resource and training needs survey of the industry.

The literature review provided an overview of the industry from its composition, size, workforce profile, trends and issues and a summary of the findings.

The complete literature review can be found in Appendix A of this report.

2.2 *EDUCATION AND TRAINING DATABASE*

An education and training database was developed for the food processing industry in Saskatchewan. Research was undertaken to gather information on relevant education and training programs and courses that are offered in Saskatchewan, Manitoba, Alberta, British Columbia and Ontario.

The database identified both accredited and non-accredited education and training opportunities. The database identifies the education and training programs or courses by institution, program name, includes a brief description, the length, method of delivery, and the contact for more information.

The complete database can be found in Appendix B of this report.

2.3 *SURVEY*

Trimension Group developed the survey instrument in consultation with the Food Processing Sector Partnership Steering Committee. Respondents were drawn from the Saskatchewan Food Processors Association (SFPA) directory. The sample was distributed to be representative of the industry in terms of size of company (number of employees) and location in terms of rural and urban communities. Interviewers were instructed to speak to the general manager/owner or, if they have one, the human resource or personnel manager. In total, 95 companies were surveyed.

The appropriate contact at large companies (20 or more employees) was called in advance to participate in the survey. Respondents were mailed a copy of the survey in order to prepare their responses.

NorSask Consumer Interviewing Services, a professional interviewing service in Saskatoon, was subcontracted to conduct the telephone surveys. Data was collected between March 3 and March 19, 1999. Trimension Group analyzed survey data using *SPSS for Windows*, a statistical software package.

2.4 *INDUSTRY VALIDATION*

A total of four focus groups were conducted between June and July 1999 as part of the validation of the survey results. The focus groups were conducted with industry members, both employers and employees, and were distributed to reflect the views of various components of the industry. The following is an overview of the composition of the focus groups.

Focus group 1: large, urban, employers	**Focus group 3**: small company, non-union employees
Focus group 2: small, rural, employers	**Focus group 4**: large company, union, employees

3.0 Human Resource and Training Needs Assessment Survey

In order to gain a broad understanding of the human resource and training needs in the food processing sector, companies were asked a series of questions on these topic areas:

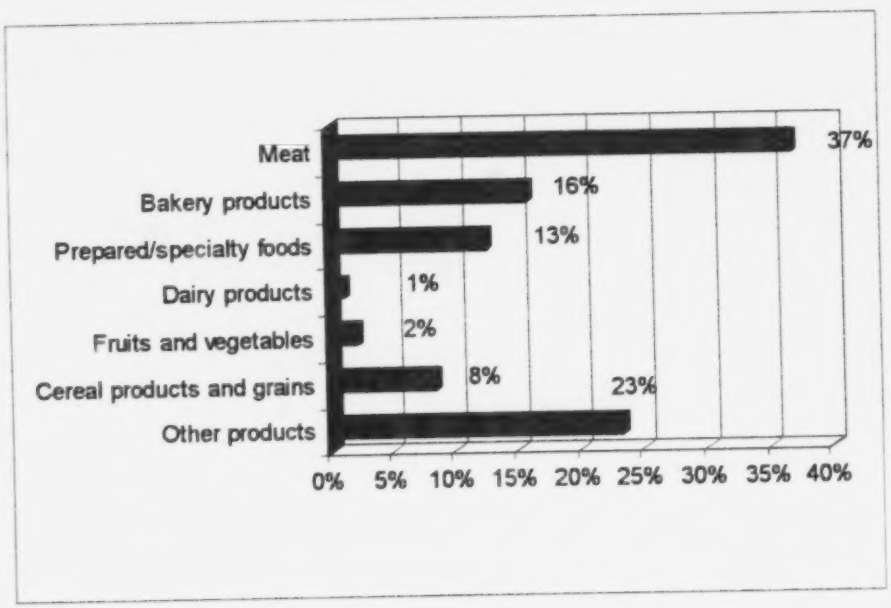
- General company information
- Employment projections
- Employee profile
- Recruitment and retention
- Skill requirements and training
- Awareness and assessment of training in Saskatchewan

The following is the detailed report and analysis of the survey results.

3.1 COMPANY INFORMATION

Companies were asked to name the main business area in which they compete. The most common responses were meat (37%), bakery products (16%), and prepared/speciality foods (13%).

Figure 1 Business Areas

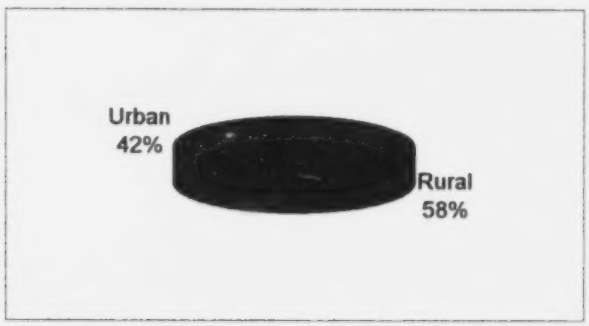


Other business areas mentioned include:

- Catalogue marketing
- Health food supplements
- Herbs, spices, and sauces
- Fish
- Spice mixes
- Beverages
- Grain processing
- Food products – grocery store
- Snack foods
- Flour & mustard processing
- Groceries
- Jam & syrup
- Vegetable oil processing
- Beer
- Bottled water
- Honey (2)

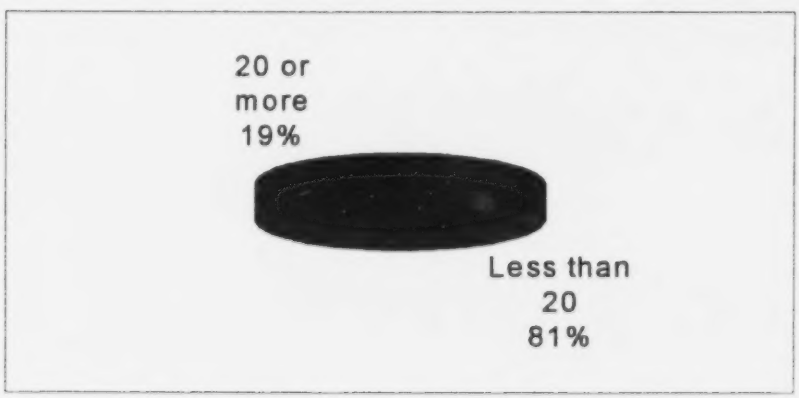
58% of the companies surveyed are located in a rural community (less than 1000 people).

Figure 2 Location



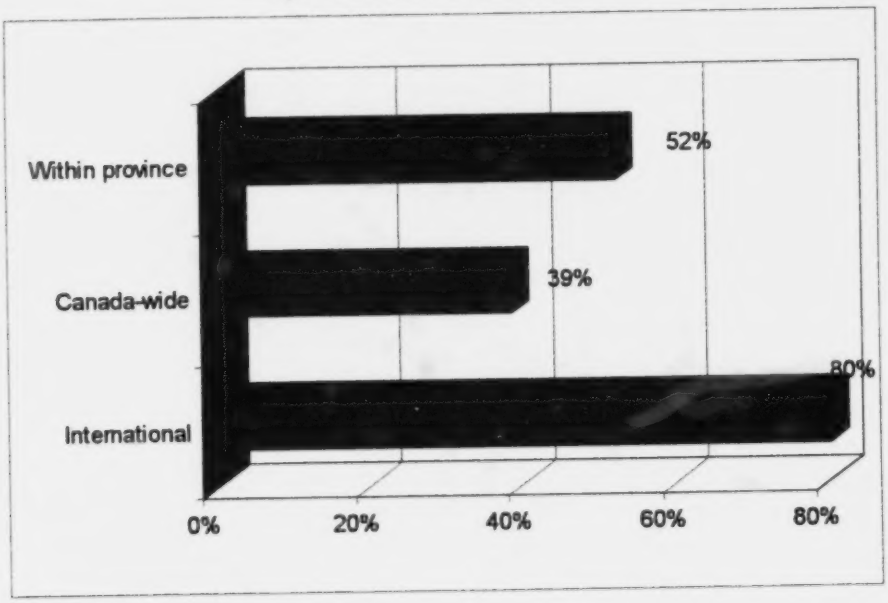
In addition, 81% of companies surveyed are small processors (less than 20 employees) and 19% are large employers (20 or more employees). The average size of the smaller companies is 7 employees and the average size of the larger companies is 74 employees. In total, 564 people work for the smaller processors surveyed and 1,340 work for larger processors surveyed for a total of 1,904 employees represented in this survey.

Figure 3 Number of Employees



19% of food processors are exporting and export sales are an average of 52% of their total revenue. The following figure presents the average percent of business generated within the province, Canada-wide, and internationally. Notably, 51 (or 54%) of the 95 companies surveyed generate 100% of their sales here in Saskatchewan.

Figure 4 Location of Markets



3.2 EMPLOYMENT PROJECTIONS

Companies were asked to indicate which of the following occupations they employ, including full-time part-time, and seasonal jobs. They were also asked to estimate how many people they expect to employ in each occupation 5 years from now.

Table 1 Employment by Occupation

Occupations	How many are currently employed?				How many do you expect to employ in 5 years?			
	Total	Full-Time	Part-Time	Seasonal	Total	Full-Time	Part-Time	Seasonal
Machine operators and related workers	264	277	21	16	358	304	28	26
Labourers in processing	620	381	188	51	710	438	224	48
Motor vehicle and transit drivers	41	37	3	1	39	35	1	3
Sales representatives	111	88	22	1	126	108	18	-
Butchers	162	150	6	6	214	196	7	11
Bakers	36	26	10	0	40	27	10	3
Material handlers	77	72	2	3	77	69	3	5
Machinery and transportation equipment mechanics (except motor vehicle)	37	34	2	1	39	36	2	1
Supervisors, processing occupations	62	60	-	2	74	71	-	3
Accounting clerks	67	50	17	-	71	56	15	-
Recording, scheduling, & distributing occupations	39	37	1	1	38	37	-	1
Trades occupations (eg plumber/ pipefitters, electricians, power engineers, etc.)	62	56	4	2	65	60	3	2
Administration managers	92	87	5	-	90	86	4	-
Quality assurance managers/Lab technicians	41	36	3	2	43	38	4	1
Sanitation supervisors	12	10	-	2	10	9	-	1
Plant or production managers	38	37	1	-	40	38	1	1
General managers	40	39	1	-	37	35	2	-
Other Occupations								
Agriculture and specialists	3	3			4	4		
Cashiers	4		4		4		4	
Farmers and farm managers	2			2	2			2
Fisherman	4			4	4			4
Food and beverage servers	6		6		6		6	
General office clerks	6	6			6	6		
Other sales occupations (demonstrators)	9		9		17		17	
Receptionists and switch board operators	2		2		2		2	

The five occupations with the largest number of employees are: labourers in processing; machine operators and related workers; butchers and bakers; sales representatives; and administration managers. As shown in the following table, companies expect growth in the next five years among machine operators and related workers (36%); butchers (32); supervisors (19%); labourers in processing (15%); sales representatives (14%); and bakers (11%).

Table 2 Employment Projections by Occupation

Occupations	Currently Employed	Expect to Employ in Five Years	Change
Machine operators and related workers	264	358	36%
Labourers in processing	620	710	15%
Motor vehicle and transit drivers	41	39	-5%
Sales representatives	111	126	14%
Butchers	162	214	32%
Bakers	36	40	11%
Material handlers	77	77	0%
Machinery and transportation equipment mechanics (except motor vehicle)	37	39	5%
Supervisors, processing occupations	62	74	19%
Accounting clerks	67	71	6%
Recording, scheduling, & distributing occupations	39	38	-3%
Trades occupations (eg plumber/ pipefitters, electricians, power engineers, etc.)	62	65	5%
Administration managers	92	90	-2%
Quality assurance managers/Lab technicians	41	43	5%
Sanitation supervisors	12	10	-17%
Plant or production managers	38	40	5%
GENERAL MANAGERS	40	37	-8%
Other occupations			
Agriculture and specialists	3	4	33%
Cashiers	4	4	0%
Farmers and farm managers	2	2	0%
Fisherman	4	4	0%
Food and beverage servers	6	6	0%
General office clerks	6	6	0%
Other sales occupations (demonstrators)	9	17	89%
Receptionists and switch board operators	2	2	0%

3.3 EMPLOYEE PROFILE

In terms of age of employees, the food processing industry employs younger people compared to the provincial averages in terms of the employed labour force. 76% of workers are in the 25 to 54 year age group compared to the provincial average of 52%. The largest age is 25 to 44 year olds. About 60% of people employed in the industry are in this age bracket.

Table 3 Age of Employees

	15-24	25-34	35-44	45-54	55-64	65 and over
Number of employees	318	535	585	325	121	11
%	17%	76%			6%	<1%
Employed labour force: provincial averages*	19%	52%			12%	18%

*Statistics Canada, Census 1996

Companies were asked to provide the average salary or wage for occupations in their company. At the time this survey was conducted, a current national or provincial comparison was not available for the food processing industry. Instead, average salaries for similar occupations across all industries in Saskatchewan were used as a reference. This information is from the 1996 Statistics Canada census.

Typically, average hourly wages for employees range from $6.00 to $20.00 depending on the type of job. Seasonal and part-time work also affect the earning power of individuals employed in wage jobs.

Table 4: Average Hourly Wages

Occupation	Average Hourly Wage	Range	Average Annual Salary in Saskatchewan [1]	Average Hourly Wage *
Machine operators and related workers (n=32)	$11.10	$5.80 – 18.30	$31,900	$15.33
Labourers in processing (n=64)	$ 8.52	$5.77 – 16.83	$25,900	$12.45
Motor vehicle and transit drivers (n=16)	$10.40	$6.92 – 16.25	$32,200	$15.48
Butchers (n=24)	$11.65	$7.00 – 19.27	$22,300	$10.72
Bakers (n=9)	$10.60	$6.00 – 20.00	$20,300	$9.76
Material handlers (n=15)	$12.00	$6.00 – 18.30	$27,800	$13.37
Machinery and transportation equipment mechanics (except motor vehicle) (n=5)	$ 7.80	$6.00 – 18.30	Unavailable	Unavailable
Recording, scheduling, & distributing occupations (n=10)	$13.15	$9.00 – 16.83	Unavailable	Unavailable
Trades occupations (eg plumber/ pipefitters, electricians, power engineers, etc.) (n=10)	$16.19	$8.00 – 20.39	Unavailable	Unavailable
Other Occupations				
Cashiers (n=1)	$ 6.00	$6.00	$15,900	$7.64
Farmers and farm managers (n=1)	$ 8.50	$8.50	$22,600	$10.87
Food and beverage servers (n=1)	$ 7.00	$7.00	$12,400	$5.96
General office clerks (n=2)	$11.00	$8.00 – 14.00	$24,300	$11.68
Other sales occupations (demonstrators) (n=2)	$ 8.50	$7.00 – 10.00	Unavailable	Unavailable

[1]. 1996 Statistics Canada data.

* The average hourly wage was calculated based on a 52 week work year and a 40 hour work week.

Average salaries for management level positions range from $23, 000 to $40, 000 depending on the type of job. Whether or not an individual owns a share of the business, and the size of the business, also affect the earning power at the managerial level.

In some cases, the average annual salary seems unexpectedly low. This can be explained in a number of ways. For instance, some of the general and administration managers are also co-owners of the business and therefore draw a small salary, which in some cases is supplemented by profit sharing. In addition some of the staff earning a lower than expected salary are part-time; some, as in the case with sales staff, earn commission to supplement their salaries. As well, job descriptions vary from company to company. For example, a plant manager in one company may have less responsibility than a plant manager elsewhere, and therefore may earn less.

Table 5: Average Annual Salaries

Occupation	Average Annual Salary	Range	Average Annual Salary in Saskatchewan[1]
Sales representatives (n=31)	$23, 006	$12,000 – 43, 000	$37,500
Supervisors, processing occupations (n=16)	$31, 311	$14,560 – 48,000	$37,100
Accounting clerks (n=22)	$22, 560	$10,000 – 37,440	$26,000
Administration managers (n= 41)*	$29, 027	$9,000 – 75, 500	$53,100
Quality assurance managers/Lab technicians (n=10)	$34, 500	$18, 720 – 51, 000	Unavailable
Sanitation supervisors (n= 3)	$36, 050	$16, 640 – 60, 000	Unavailable
Plant or production managers (n=13)	$33, 015	$12,000 – 78, 500	Unavailable
General managers (n= 22)	$34, 130	$10,000 – 75,000	Unavailable
Other Occupations			
Agriculture specialists (n=1)	$40, 000	$40, 000	$47,500

[1] 1996 Statistics Canada data.

* The Statistics Canada average annual salary of administrative officers/office managers is $36, 100.

As tables 6 and 7 demonstrate, urban companies have an advantage over rural companies in terms of the salaries and wages they can offer to employees. In almost all cases, urban employees earn more than their counterparts in rural areas.

In certain occupations the difference between urban and rural earnings is quite a large margin. For example, machine operators, drivers, and material handlers have far greater earning potential in urban areas than rural areas.

Table 6: Trade and Other Occupations, Rural versus Urban Wages

Occupation	Rural Average Hourly Wage	Rural Range	Urban Average Hourly Wage	Urban Range
Machine operators and related workers	$9.40 (n=15)	$5.77 – 16.00	$12.55 (n=17)	$6.00 – 18.30
Labourers in processing	$7.89 (n=33)	$5.77 – 13.00	$9.20 (n=30)	$6.00 – 16.83
Motor vehicle and transit drivers	$8.94 (n=9)	$6.92 – 12.00	$12.20 (n=7)	$9.00 – 16.25
Bakers	$ 7.33 (n=3)	$6.50 – 9.00	$12.24 (n=6)	$6.00 – 20.43
Butchers	$11.73 (n=14)	$8.50 – 19.27	$11.52 (n=10)	$7.00 – 16.00
Material handlers	$10.49 (n=6)	$8.00 – 13.00	$12.95 (n=9)	$6.00 – 18.30
Machinery and transportation equipment mechanics (except motor vehicle)	$16.40 (n=2)	$14.50 – 18.28	$18.70 (n=3)	$18.27 – 19.39
Recording, scheduling, & distributing occupations	$12.16 (n=4)	$11.00 – 14.00	$13.79 (n=6)	$9.00 – 16.83
Trades occupations (eg plumber / pipefitters, electricians, power engineers)	$14.00 (n=4)	$8.00 – 19.00	$17.65 (n=6)	$10.79 – 20.39

In managerial positions as well, earnings in urban areas are typically higher than in rural areas. Contrary to what one might expect, however, the average salary for general managers in urban businesses is less than the salary for their counterparts in rural areas. This can be explained by the presence of three urban businesses in the survey that are small and typically owned by the general manager. In these cases the general manager earns far less than the average. Excluding these three businesses, the average general manager salary for urban business is $37, 330.

Table 7: Management Occupations, Rural versus Urban Salaries

Occupation	Rural Average Annual Salary	Rural Range	Urban Average Annual Salary	Urban Range
Sales representatives	$19, 850 (n=12)	$12, 000 – 31, 200	$25, 000 (n=19)	$12,480 – 43, 000
Supervisors, processing occupations	$28, 560 (n=7)	$21, 320 – 37, 440	$33, 450 (n=9)	$14,560 – 48, 000
Accounting clerks	$23, 185 (n=7)	$16, 640 – 37, 440	$22, 670 (n=15)	$10,000 – 34, 000
Administration managers	$24, 830 (n=26)	$9, 000 – 48, 500	$36, 300 (n=15)	$12,480 – 75,500
Quality assurance managers/Lab technicians	$29, 000 (n=4)	$18, 720 – 35, 000	$38, 170 (n=6)	$20,400 – 51, 000
Sanitation supervisors	$24, 070 (n=2)	$16, 640 – 31, 500	$60, 000 (n=1)	$60, 000
Plant or production managers	$28, 984 (n=5)	$12, 000 – 45, 000	$35, 530 (n=8)	$16, 640 – 78, 500
General managers	$36, 700 (n=9)	$20, 000 – 60, 000	$32, 340 (n=13)	$10, 000 – 75,000

Note: Number of rural companies surveyed = 55. Number of urban companies surveyed = 40

Working for a large company can often make a large difference in earnings. As the tables below show, employees in large firms in many of the occupations earn considerably more. Machine operators, material handlers, and labourers in large companies typically earn far more than their counterparts in small companies.

Table 8: Small versus Large Companies, Wages

Occupation	Small Company Average Hourly Wage	Small Company Range	Large Company Average Hourly Wage	Large Company Range
Machine operators and related workers	$9.15 (n=20)	$5.77 – $15.00	$14.30 (n=12)	$9.00 – 18.30
Labourers in processing	$7.69 (n=50)	$5.77 – 16.83	$11.70 (n=13)	$7.25 – 16.10
Motor vehicle and transit drivers	$9.15 (n=9)	$6.92 – 16.25	$11.95 (n=7)	$9.27 – 16.00
Bakers	$9.40 (n=8)	$6.00 – 15.00	$20.45 (n=1)	$20.45
Butchers	$11.30 (n=21)	$7.00 – 19.27	$14.15 (n=3)	$13.00 – 16.00
Material handlers	$8.90 (n=4)	$6.00 – 13.00	$13.10 (n=11)	$8.32 – 18.30
Machinery and transportation equipment mechanics (except motor vehicle)	- (n=0)	-	$17.80 (n=5)	$14.50 – 19.39
Recording, scheduling, & distributing occupations	$9.00 (n=1)	$9.00	$13.60 (n=9)	$11.00 – 16.83
Trades occupations (eg plumber/ pipefitters, electricians, power engineers, etc.)	$8.00 (n=1)	$8.00	$17.10 (n=9)	$10.00 – 20.39

Note: Small companies are defined as employing less than 20 employees

Salaries reflect the same trend as hourly wages; large businesses can afford to pay their management staff more than small businesses. In some cases, urban employees earn significantly more, as in the case of sales representatives and quality assurance managers/lab technicians. The average annual salary for accounting clerks in urban businesses is less than in rural businesses. This can be accounted for by the presence of three small urban businesses which hire accounting services on a part-time or as needed basis or who do it themselves.

Table 9: Small versus Large Companies, Salaries

Occupation	Small Companies Average Annual Salary	Small Company Range	Large Companies Average Annual Salary	Large Company Range
Sales representatives	$19, 180 (n=24)	$12,000 – 40,000	$36,130 (n=7)	$24,960 - $43,000
Supervisors, processing occupations	$26, 765 (n=7)	$14,560 – 48,000	$34, 850 (n=9)	$21,320 - $47,000
Accounting clerks	$30, 300 (n=12)	$10,000 – 37,440	$25, 270 (n=10)	$16,640 – 34,000
Administration managers	$23, 300 (n=31)	$9,000 – 60,000	$46, 670 (n=10)	$30,000 – 75,500
Quality assurance managers/Lab technicians	$20, 400 (n=1)	$20,400	$36, 070 (n=9)	$18,720 – 51,000
Sanitation supervisors	- (n=0)	-	$36, 050 (n=3)	$16,640 – 60,000
Plant or production managers	$17, 560 (n=4)	$12,000 – 24,960	$39, 880 (n=9)	$19,760 – 78,500
General managers	$25, 890 (n=15)	$10,000 – 35,000	$51, 780 (n=7)	$33,280 – 75,000

Note: Large companies are defined as employing 20 employees or more.

Benefits provided by employers include:

Table 10 Benefits

Benefits	Number of Companies
Medical/dental/disability/life insurance	33
None	25
Bonuses	5
Free products	3
Retirement benefits	3
Discounts on some merchandise	3
Provide uniform	2
Company vehicle	2
Free lunches	2
EAP	2
Tuition assistance	2
Profit sharing	1
Not applicable – family business	1
Room and board on the job	1
Sick leave	1
Social services	1
Flexible hours	1
Wholesale prices	1
First Aid/CPR	1
Stock options	1
Incentive plan	1

As shown in the following table, over half of workers in the food processing industry (62%) have completed high school compared to 22% for the employed labour force for Saskatchewan.

Table 11 Educational Attainment

	No degree, certificate, or diploma	Secondary (high school certificate)	Trades certificate or diploma	Other non-university certificate or diploma	University degree, certificate or diploma
Number of employees	300	978	156	51	95
%	19%	62%	10%	3%	6%
Employed labour force: Provincial average*	34%	22%	14%	14%	16%

*Statistics Canada, Census 1996.

In terms of the equity statistics obtained, the following was reported by the survey respondents:

- persons with disabilities and women may be underrepresented when comparing to the provincial work force statistics;
- for Aboriginal people, they represent 6% of the workers in this industry which is higher than the 4% provincial average; and
- visible minority workers represent 3% of the food processing industry labour force, which is equal to the provincial average.

Table 12 Equity Statistics

	Aboriginal	Women	Visible minorities	Persons with disabilities
Number of employees	112	579	55	33
Number of companies	25	88	13	18
% of all employees	6%	31%	3%	2%
Employed labour force: provincial averages*	4%	44%	3%	5%

*Statistics Canada, Census 1991.

3.4 RECRUITMENT

Companies were asked to rate a number of potential difficulties employees may face in trying to find a job in the food processing industry on a scale of 1 to 5 where 1 is not at all a difficulty and 5 is a major difficulty. The following table shows the average rating and the percentage answering 4 or 5, as well as the number of companies responding to the question (n).

The requirement for "a good work ethic" emerged as the main barrier for potential employees as 61% of companies stated it is a difficulty.

Table 13 Difficulty Finding a Job in the Food Processing Industry

Difficulty Finding a Job in the Food Processing Industry	Average Rating	% Answering 4 or 5
Need proper training (n=93)	3.0	34.4
Need food processing experience (n=93)	2.6	21.5
Must have a good work ethic (n=93)	4.3	60.6
There is high competition for jobs (n=89)	2.5	17.9

Other difficulties mentioned include:

- Personal hygiene (5)
- Must be willing to work (4)

- Must be strong/physically fit (3)
- Must be proactive in seeking job (2)
- Experience and education (2)
- Knowing about products/processes (2)
- Must be reliable (2)
- Interest in job (2)
- Willing to take direction (2)
- Location in rural setting (2)
- Meeting changing codes of meat industry (1)
- Food science people would have trouble finding work (1)
- Transportation to travel to work and travel for work (1)
- 1 ½ yrs to be able to work on own (1)
- Close attention to detail (1)
- Odd hours, nights, and evenings (1)
- Sanitation (1)
- Seasonal (1)
- Downsizing in dairy with new technology (1)
- Lack of jobs (1)

Companies were asked to rate a number of potential difficulties employers may face in trying to recruit workers in the food processing industry on a scale of 1 to 5 where 1 is not at all a difficulty and 5 is a major difficulty. The following table shows the average rating and the percentage answering 4 or 5, as well as the number of companies responding to the question (n).

Overall, companies agree that all factors present some difficulties in recruiting workers. Half of companies agree that it is difficult to attract employees because of a rural location (54%) and because they are unable to offer competitive wages (51%).

Table 14 Difficulty Finding Workers for the Food Processing Industry

Difficulty Finding Workers for the Food Processing Industry	Average Rating	% Answering 4 or 5
It is hard to attract employees to rural locations (n=76)	3.8	54
It is difficult to offer competitive wages (n=93)	3.5	50.5
There is no skilled labour available (n=93)	3.0	38.7
There is no experienced labour available (n=93)	3.2	42

Other challenges employers face in recruiting employees include:

- Hard to find people willing to work (17)
- Unable to offer high wages (5)
- Hard to find people in rural community (4)
- Hard to find part-time/seasonal workers (3)
- Hard to find people interested in work (4)
- Hard to find people willing to meet physical demands (2)

- Hard to find flexible people (2)
- Shortage of skilled workers (2)
- Only have part time to offer/seasonal work (2)
- Relocating people to SK from other parts of Canada (1)
- Finding people committed to quality (1)
- Hard to find people willing to slaughter (1)
- The hours they have to work (1)
- Finding aboriginal people that will work (1)
- Train them, they then leave (1)
- Some people don't like working with bees and the hot weather (1)

Overall, most processors (87%) don't feel employee turnover is a problem for their company for the following reasons:

- Good working environment (15)
- Enjoy job and take pride (8)
- Employees have been here a long time (7)
- Family (6)
- Can find replacements (4)
- Good wage and benefits package offered (5)
- Flexible work environment (3)
- Work is seasonal and layoffs expected (2)
- Small town-people keep jobs (2)
- Loyal (2)
- Owners are approachable and it is a team effort (2)

For an estimated total of 1,904 people employed by the companies surveyed, 11% voluntarily left their jobs last year, while 3% were terminated, and 2% were laid off. The overall turnover rate was 16%.

Table 15 Turnover

	Left voluntarily	Terminated	Lay offs
Number of people	211	52	33
% of all employees	11%	3%	2%
# of companies responding	46	17	13

Companies were asked why employees leave their company and were asked to rate a number of possible reasons on a scale of 1 to 5, where 1 is never a reason and 5 is often a reason. The most common reasons employees gave for leaving their jobs include leaving for better opportunities elsewhere (38%) and leaving for better wages elsewhere (36%).

Table 16 Reasons Employees Leave

Reason for Leaving	Rating	Percent answering 4 or 5
Better opportunities elsewhere(n=87)	3.0	36.7
Better wages elsewhere (n=87	2.8	35.6
Going back to school (n=86)	2.1	17.5
Retirements (n=88)	1.4	6.8
Hours are too long (n=87)	1.4	4.6
Lack of training (n=87)	1.4	3.4
Lack of benefits (n=86)	1.5	5.8
Job is too stressful (n=87)	1.6	4.6
Physical demands of the job are too great (n=87)	2.0	17.2
Poor work environment (dust, noise) (n=87)	1.4	13.7
Poor communication between management and employees (n=87)	1.4	5.7
Having to work shifts and weekends (87)	1.6	8.0
Leaving for personal reasons (n=87)	1.9	10.3

A few other reasons mentioned were:

- Fear of being stung by bees
- Rural setting
- Unmotivated
- Severance when downsizing
- Part time work
- Poor work ethic

Companies reported few vacant and underskilled positions.

Table 17 Vacant and Underskilled Positions

Occupations	Vacant Positions	Underskilled Positions
Machine operators and related workers		
Labourers in processing	2 at an herb company	1 at a bakery
Motor vehicle and transit drivers		
Sales representatives	1 marketer for a health food co. 1 for a bakery 1 for a bakery products company	1 for a berry processor
Butchers and bakers	1 baker	
Material handlers		
Machinery and transportation equipment mechanics (except motor vehicle)		
Supervisors, processing occupations	1 floor manager at a bakery	
Accounting clerks	1 for a grain processor	1 for a bakery
Recording, scheduling, & distributing occupations		
Trades occupations (eg plumber/ pipefitters, electricians, power engineers, etc.)	2 for a bakery products company	
Administration managers		
Quality assurance managers/Lab technicians		Hard to find for a meat company
Sanitation supervisors		
Plant or production managers		
General managers		
R & D		1 for prepared/speciality foods company
Purchasing manager	1 at a meat processor	
Health & Safety Manager	1 at a meat processor	
Slaughter	1	
Meat Cutters		1

3.5 SKILL REQUIREMENTS AND TRAINING

Companies were asked to rate the extent to which employees and owners/managers have a number of **industry-specific skills**, where 1 is very low skill and 5 is very high skill. The average rating is provided. As seen in the following table, skill areas where more training is needed for employees include:

- HACCP
- ISO 9000
- R & D
- Scientific knowledge and skills

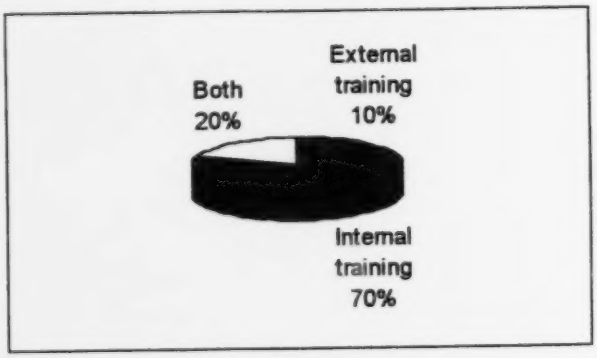
Skill deficiencies among owners/managers include ISO 9000.

Table 18 Industry-specific Skills

Industry-Specific Skills	Employees	Owners/Managers
Knowledge of the food processing industry	3.2	4.4
Manufacturing/processing knowledge	3.1	4.4
Food safety and handling	4.0	4.6
Quality control	3.7	4.6
Hazardous Analysis and Critical Control Points (HACCP) system	2.9	3.9
ISO 9000	1.9	2.7
Research and development	2.0	3.6
Sanitation	4.1	4.6
Scientific knowledge and skills	2.2	3.4
Good manufacturing practices (GMP)	3.7	4.3
Ingredient proportions/recipes	3.6	4.7
Equipment operation	4.0	4.5

10% of companies prefer that industry-specific skills training be delivered by sending employees to an external training provider, association, or accredited training body, while 70% prefer to do in-house training either using company resources or bringing in trainers.

Figure 5 Industry-specific Skills Training



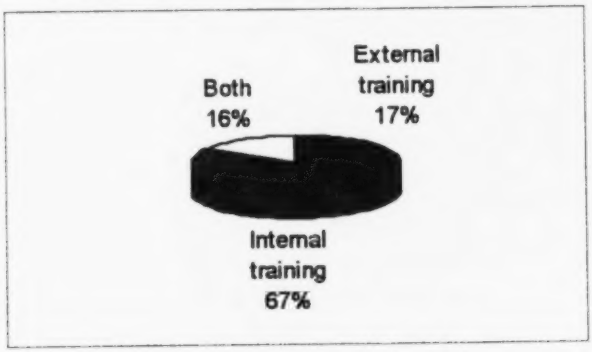
Companies were asked to rate the extent to which employees have a number of **employability specific skills**, where 1 is very low skill and 5 is very high skill. The average rating is provided. Overall, companies in general feel that employees are strong in employability skills.

Table 19 Employability Skills

Employability Skills	Employees
Willingness to work	4.3
Punctual	4.2
Personal hygiene	4.4
Ability to follow direction	4.2
Ability to work with others as a team	4.3
Communication	4.0
Literacy/numeracy	4.0
Ability to communicate in English	4.7

67% would you prefer employability skills training be delivered in-house either using company resources or bringing in trainers.

Figure 6 Employability Skills Training



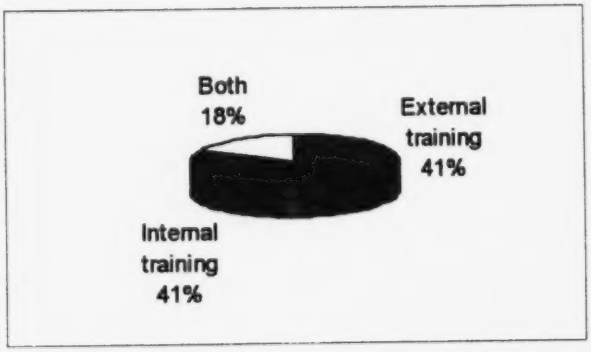
Companies were asked to rate the extent to which employees and owners/managers have a number of **business skills**, where 1 is very low skill and 5 is very high skill. The average rating is provided. Among employees, there may be skill deficiencies in terms of exporting skills, computer skills, strategic planning, and law. Owners/managers may be lacking computer skills and exporting skills.

Table 20 Business Skills

Business Skills	Employees	Owners/Managers
Sales	3.0	4.3
Marketing	2.8	4.1
Merchandising	2.7	4.1
Law	2.5	3.7
Financial management or accounting	2.8	4.1
Strategic planning	2.3	3.9
Human resource management	2.6	4.0
Distribution	2.9	4.0
Logistics	2.6	3.8
Credit	2.6	4.2
Costing	2.7	4.3
Exporting	1.8	3.6
Computer skills	2.2	3.0

41% prefer business skills training be delivered by sending employees to an external training provider, association, or accredited training body, while 41% prefer in-house training.

Figure 7 Business Skills Training



Companies rated a list of barriers employers may have to training on a scale of 1 to 5, with 1 being not a problem and 5 being a serious problem. The average rating is provided as well as the number of companies answering 4 or 5. The greatest barriers to training include: cost of taking people off the job (48%), and the cost of living expenses to employees while not working (48%), and lack of time (46%).

Table 21 Barriers to Training

Barriers	Average Rating	Percent Answering 4 or 5
Lack of time (n=91)	3.2	46.2
Lack of resources (n=90)	2.8	28.9
Lack of space (n=88)	2.5	26.2
Lacking awareness about training options/programs (n=89)	2.8	29.2
Logistics of scheduling training sessions (n=83)	2.9	31.3
Availability/capability of in-house expertise (n=87)	2.6	26.4
High percentage of seasonal workers (n=47)	2.1	21.3
Union relations (n=20)	1.5	5
Cost of tuition and books (n=66)	2.3	18.2
Cost to employee of living expenses while not working (n=65)	3.0	47.7
Distance to training institutions (n=75)	2.8	38.6
Cannot afford to take people off the job for training (n=80)	3.1	47.5

Other barriers to training mentioned include:

- Employees unwilling/uninterested (3)
- Uniqueness of beekeeping
- Availability of training
- Availability of equipment
- Timing of course
- Paying overtime to production people to train on days off
- Defining training and creating program

The survey results showed no identifiable pattern or trend as to what the most suitable season to offer training would be. Companies commented on the fact that turnover costs money in terms of retraining new employees. The following are examples of the type of comments companies provided when asked about the impact of and the seasonality of timing the training:

"As soon as they are trained, they go on to better jobs." (2)

"It definitely has an impact because we lose a lot of our good people due to the seasonality."

"When there is cyclical downturn in business we have to lay off trained employees who find other jobs. New employees hired when conditions improve must be trained."

"Some seasonal employees are short term and we train them in house. This gives them some experience to move on to higher paying jobs and they do."

"Work is seasonal and some of the employees find other jobs and we have to train their replacements."

"Spend the time and money to train and then they turn around and find another job because of the seasonal nature."

"Some employees who do not look long –term…we would not train them."

"We spend 4 hours on orientation and 40 hours to train part-time employees. 25% will not be employed with us in three months so it's a big expense and low payback for our time."

Companies also commented on the challenge of scheduling training due to fluctuating production levels:

"Sporadic state of our production and makes it difficult to schedule training sessions for seasonal employees."

"Depending on the markets you can never tell when you are going to be busy or not. It is hard to schedule the training."

"We are busy except for two months of the year. In the fall or summer we couldn't send anyone on training as it is our busy time."

"It depends if it's going to be a busy summer or not. You never know from day to day how busy it's going to be or even from week to week."

"We had a student come in November and we found that peak times is not a good time to do training."

"Summers are our slowest time. Christmas and the end of May are our busiest times."

"Our business is fairly steady and it's difficult to spare people in November and December. Other than that time, I don't see that it is a problem."

"Really busy time where we need extra people and don't have time to train them and also they are only here for a short time."

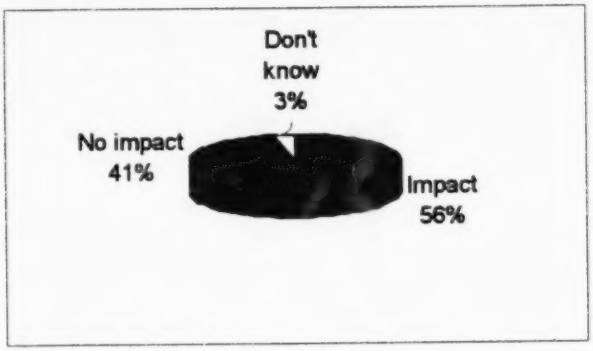
"We have more time in winter for training."

"If it was a busy season, it would be hard to train."

"We require seasonal workers and train on the job. We have taken them on safe food handling courses. Seasonal workers are a necessity in our business."

56% of companies anticipate that the impact of information technology (computers, automation, the Internet) will affect their organization, employees, and/or labour market requirements in the next 5 years.

Figure 8 Impact of IT



Information technology will have an impact on training in that employees will need to have computer skills. Marketing and advertising will also be affected in terms of new communication technologies. As companies use more automated processes in production, they may require fewer workers.

Their comments regarding potential impacts include:

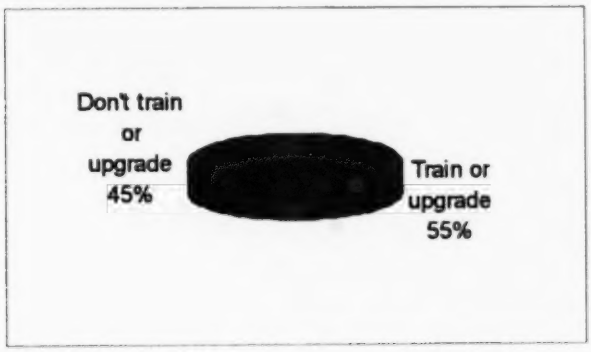
- Employees will have to learn computer skills (17)
- New technology will increase our efficiency therefore fewer employees (11)
- Impacts on marketing and advertising (11)
- Automate processes (6)
- Better trade/market information (4)
- More cross-training will be required (2)
- Internet (2)
- Office work and customer communications (2)
- Better budgeting (1)
- Improve taking/placing orders (1)
- Will make accounting easier (1)
- Easier to buy special supplies on Internet (1)
- Distribution (1)
- Educational tools (1)
- Interact (1)
- Government want more detailed/timely reports (1)
- Need finances for technology and training (1)

- Will need more formal education (1)
- Lower cost of production (1)
- Increase sales (1)
- Reduce seasonal nature (1)
- New methods of transferring information and data will be required (1)
- Needing more technical staff (1)

3.6 TRAINING OPTIONS – AWARENESS AND ASSESSMENT

55% (or 52 companies) provide training or upgrading to employees currently or have within the past three years.

Figure 9 Training or Upgrading



38% (or 36 companies) provide internal training to employees using their own company trainers or employees. The main areas of internal training are job-specific training, machine operation, HACCP, food safety, orientation, and computers. The responses included:

- Job-specific training (7)
- Machine operation (6)
- HACCP (5)
- Food safety (5)
- Orientation (5)
- Computer (4)
- Meat cutting and butchering (2)
- Marketing/sales (2)
- Food courses (2)
- WHMIS (2)
- GMP (2)
- Safety (2)
- Management
- Dealing with public
- Future skills
- Dangerous goods
- Merchandising
- Boning
- PR
- Public relations
- Policies and procedures
- Seed analyst
- Updating
- Quality control
- Literacy/social/life skills
- Office automation
- Mentorship

37% (or 35 companies) currently use training courses or programs provided by other training providers. Key areas of external training include computers, safe food handling, sanitation, HACCP, and business related topics (Table 22).

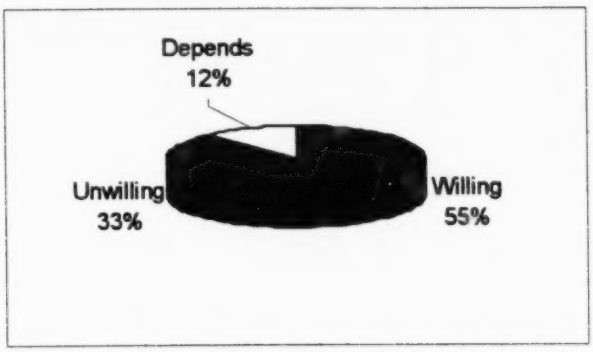
Table 22 External Training Provided

Type	Name of School
Accounting	SIAST – Kelsey
Agriculture (3rd Year)	U of S
Apprenticeship	SIAST
Baking school	CSP Saskatoon
Beekeeper assistance course	Kelsey
Cake decorating	Olds College
Communication	Palliser SIAST
	Personal Best Seminars (Calgary)
Computer	SE Community College
	Prairie West Regional
	MicroAge
	Private training organization (4)
	Individual
	U of R
	Community college
Distribution	BCL Management
First Aid	Prairie West Regional
Food products and additives	U of S
Food Quality Control	Extension at University
Food Safety & Handling	SFPA
GED	Carleton Trail
HACCP	Quality First (2)
Human Resources	Rework consultants
Management	Private
	SIAST
Marketing	BCL Management
	Franchiser
	Chamber of Commerce
Meat cutting	Community college
Package design	BCL Management
Quality control	BCL Management
Quality First	U of S (2)
R & D/Marketing	No response
Safe food handling	Dept of Health, Fort Qu'appelle
	Carleton Trail
	Government sponsored
	SFPA
	Public health (3)
Sanitation	Wadena
	Community college
Sausage Making	Olds College
Seed Grader	Canadian Food Inspection Agency
Seminars	Fred Pryor
	Fred Pryor

Upgrades	Government
Work place design	SFPA

55% of companies indicated they are willing to pay for training while 33% are not. 12% believe it depends on the situation. 23 companies were able to provide an estimate of the percentage of payroll spent on training. On average they allocate 5% of their payroll for training employees.

Figure 10 Willing to Pay for Training



Two companies commented that they are unwilling to pay for training due to turnover. Many companies' willingness to pay for training depends on the benefits of the training. It is interesting to note that 23 companies stated that because they provide training internally there are no costs involved. Other comments centred on the idea of sharing costs with employees and possibly with government. Responses included:

- Depends on costs versus benefits of training (26)
- Train internally so no costs is involved (23)
- Willing to pay for all training (15)
- Can't afford training (5)
- Share costs with employee (3)
- Government should share in costs (2)

Some of their comments include:

"It's not necessary. Any training our people need can be done right here by us."

"We have to do most of our training in house because we have trade secrets to teach our employees."

"I might be willing to pay for training of it was required and if it would benefit the business."

"If the training is worthwhile then I will pay for it. Employees should share the cost because they do benefit from it."

"It depends. I would like to see at least 50% of the costs provided by the either the Federal or Provincial government since everybody would benefit if employees received more training."

"We would have to weigh the value of the training with the cost but we would be willing to pay for it."

"If they needed it we would pay for it no matter what the cost."

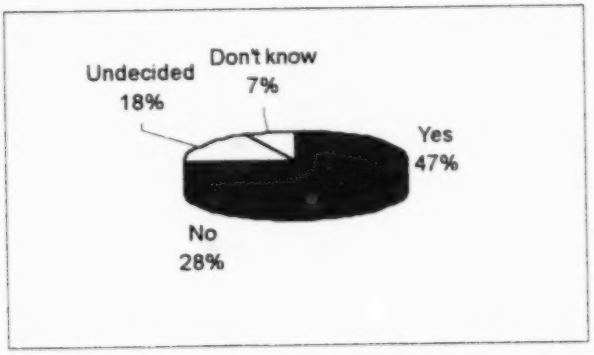
"Having trained employees is good for our business."

"Training will increase efficiency and benefit the company."

"For HACCP training we would spend because it would improve quality and there is a benefit in that."

Just less than half of companies (47%) stated that education and training programs in Saskatchewan meet their company's training needs, while 28% believe their needs are not being met. 25% are undecided or "don't know."

Figure 11 Satisfied with Education and Training Programs



Comments on training focussed on the need for more awareness of what training is available for processors in Saskatchewan, as well as improvements to meat cutting courses currently offered. There is also a need for baking training in Saskatchewan. Safe food handling, HACCP, and OHS also emerged as important areas.

A complete listing of all companies' comments for this question is presented in Appendix B.

- Unaware of training programs for industry (5)
- Baking training in Saskatchewan (5)
- Advanced meat cutting courses (3)
- Emphasize on the job training (3)
- Safe food handling (3)
- Basic slaughtering (2)
- HACCP (2)
- OHS (2)
- Equipment maintenance and operation (2)
- Marketing (2)
- Meat processing
- Meat cutting consulting
- Wholesale meat cutting
- Pasteurizer training
- Comprehensive beekeeping course
- Cake decorating
- Internet
- Hygiene
- Work ethics
- Comprehensive basic food processing
- GMP
- Quality control
- Inventory control
- Make training more accessible to small companies
- Training inadequate
- Supervisory training
- Grain processing
- Oat processing
- Chocolate making
- Rice
- Oils

77% of companies want direct access to information on food processing training. Among those who want more information, the preferred way to receive the information is by an industry newsletter or mail-out. The responses included:

- An industry newsletter or mail-out (90%)
- Fax (60%)
- A condensed form and you can phone for more information (58%)
- Internet – website/email (34%)
- Information should be located in central location (22%)

75% of companies want more information about the Food Processing Sector Partnership.

4.0 Industry Validation

The following is a summary of the three focus group discussions held during the week of May 31st to June 4th, 1999. The topics discussed were based on the results obtained from the survey.

4.1 GROUP #1 – LARGE EMPLOYERS

4.1.1 Recruitment and Retention

Participants identified education and training, technology and the seasonality of employment as the main barriers to employment in the industry. With large companies operating in a more formalized environment, and as the use of technology increases, education is becoming more important. Employers are looking for a candidate with a minimum high school education level, who has had some training. Computer literacy is essential when dealing with an ever increasing level of technology. Large employers are seeing a decline in their manual labour demands as new technology is brought into the plant. As well, full-time jobs are not always available due to the seasonality of particular products. Another challenge to a potential or current employee in the industry is that they need to be multi-skilled. Today's jobs require an employee to take on a variety of responsibilities, however large companies also have a greater opportunity for employee advancement.

Participants agreed that turnover is not a problem in the industry. Companies experience the most turnover in low skill, low pay positions. Retention is typically high, as a majority of employees choose to make a career out of their jobs. This can lead to some problems such as resistance to change and upgrading skills. Resistance to change can be overcome by asking for employees input and suggestions. By including the staff in the process, they will be more likely to work with change rather than against it. By recognising their contributions, employees will remain on the lookout for cost saving measures.

Focus group participants stress the rate of pay, light manual labour, and shift flexibility as reasons for staying in the industry. Even though rates of pay for workers on the floor are fairly low, companies pay key people good salaries to keep them. While automation may reduce the levels of employment on the floor, it also has reduced the physical demands and increased the variety of work. Hours of work may be also attractive to employees, for example some plants have increased the work day to 10 or 12 hour shifts and decreased the number of shifts to 3 per week.

Participants stressed two factors for leaving the industry, low pay and high taxes. Employees appear not to be as loyal as they once were. After developing transferable skills they are more likely to leave the industry. Others are leaving the province, feeling the opportunity is greater in Alberta and British Columbia. Shift work can also be a factor when juggling a family. The advent of shift work in the province may cause some difficulties for Saskatchewan workers. Because the industry is not as mature as food processing in other provinces, workers and their families in Saskatchewan will have to adjust to increasing amounts of shift work.

4.1.2 Skills and Training

Focus group participants were asked what kinds of training employees need to have to work in the food processing industry. Common skills and courses include the Food Handlers Safety course, Statistical Process Control, Good Manufacturing Practice, computer literacy, and St. John's Ambulance First Aid. Participants said that there are too few large companies in Saskatchewan to create much of a demand for specific courses on a provincial level. Large companies will take the initiative in offering training in specific areas to their employees. However, small companies do not have the resources to offer standardized courses in house.

When asked if employees in this province are well trained, the participants said there was not enough demand in the province to offer specific food industry related training. Large companies send their employees to courses offered by institutes such as the American Institute of Baking (AIB) in Guelph or Kansas. At this point, any training offered in Saskatchewan by the SFPA should focus on areas that are going to service a variety of different companies, for example, customer relations.

Accreditation from an internationally recognized organization or an organization recognized in the market the company is selling in is becoming increasingly important due to more companies marketing their product outside of Saskatchewan. If the SFPA were to bring in training, employers are looking for general skills that would be useful to the industry on the whole. As one participant noted, the industry in Saskatchewan is in a pioneering, maturing phase and it is not good for the SFPA to take on too much. Educational efforts should focus on raising awareness of the types of accreditation and training people in specific industry need.

Participants agreed that training is generally not hard to find and arrange. Upgrading is becoming more important due to the ever changing economy. The quality and sanitation of the product must continuously improve due to changes in technology. Equipment will be the guiding force in the industry and therefore employees will need to keep up to date. Price competition between companies remains an issue, for each company must remain competitive to survive and must have well trained employees to do this

Keeping industry in Saskatchewan is also an issue. Participants believe that unless the tax ratio decreases, there is no opportunity for a large plant to be constructed in the province.

4.1.3 Training Information

Participants were asked if any information could be provided on training programs that would be useful to them. Employees are looking for an easy to read directory that lists the different courses available. This would save the time of looking through various course calendars or phoning institutions for course information.

Employers are looking for a trainer who knows of practical examples that employees can relate to, rather than just reading from a text. Other ideas include creating a general plant operations course.

4.2 GROUP #2 – SMALL EMPLOYERS

4.2.1 Recruitment and Retention

Participants were asked their opinions on the biggest barrier people face when looking for a job in the food processing industry. Attitude, incentive, and the willingness to work hard were thought to be important factors. A basic education is necessary, for example a minimum of grade 10 and the willingness to learn on the job. This expected education level is lower than that of larger companies in the industry, due to a less formalized work environment and less chance of advancement.

Small employers do not consider turnover an issue. They attribute this in part to a core group of staff, with seasonal workers available at peak times. Often these companies hire high school and post-secondary students over the summer and keep them on throughout the year on weekend and holiday shifts. There is access to government subsidies for summer wages. One participant suggested the government subsidize wages for students to work throughout the year. This would let a student keep steady employment, pay for school and would cut down on the costs of retraining and turnover for the company.

This group believes variety and a good working atmosphere are key reasons people remain in the food processing industry. A small company generally has a better working relationship with their employees, and employees are willing to work for a little less pay to have that benefit. There is more hands-on training and often less technology to deal with, because small companies do not have the resources to offer formalized training and high-end technology.

As well, small companies pay key people well enough to keep them on a long-term basis. Those they feel are doing their jobs satisfactorily but are not excelling are kept at a lower rate of pay. There is a higher rate of turnover among these people, but employers feel they are more easily replaced.

4.2.2 Skills and Training

Participants identified key areas of training and employability skills employees need to be successful in a small food processing business. Employees need to understand basic issues of cleanliness, recipes and safe food handling. A class 5 drivers licence, and being capable of driving a standard transmission are often necessary for making deliveries. Other qualities such as common sense, a good attitude and initiative are also important. Small companies prefer to hire people with a background in the industry, but sometimes find very experienced people are unwilling to adapt to the employers ways of doing things. Education is not necessarily a crucial factor for smaller companies. They typically look for people with satisfactory literacy and numeracy skills who are willing to work and learn the particularities of their business.

The costs associated with training is an issue with smaller companies. Many of the trainers available are too costly. Others prefer to train in-house due to the specialization of their business. The Food Safe course is popular among employers.

Small business people would like to see more business skills courses that are reputable offered to them. They would like to see more variety in inexpensive short courses, i.e. one or two days in length. Topics such as recruiting, basic accounting and human resource management and costing are common areas of interest. They felt that although there is a need for such courses among small business people, there might also be some hesitancy as people may not want to admit to needing basic business skills. Other suggestions included individual courses on CD-ROM. Computer based individual learning allows an individual to set their own pace and work around their busy schedule. One of the benefits of training for small business would be to help producers correctly value their product. One producer indicated that Saskatchewan small businesses undersell their products, largely due to improper costing procedures.

Participants could not afford the cost or time to attend courses that turn out to provide them with little benefit. Some are hesitant about taking short courses due to bad experiences in the past. They would need to know the course is being provided by a reputable organization and would need to know the specifics about the content before enrolling.

4.2.3 Training Information

Participants were asked how they would choose a credible training program for their company. IRAP was mentioned as the best government program available at this time, but there appears to be problems with support for growing small businesses. Those in small companies commented that often times the owner is also the staff. There can be a real divergence in training between large and small companies.

4.3 GROUP #3 – NON-UNIONIZED EMPLOYEES

4.3.1 Recruitment and Retention

Participants were asked their opinions on the biggest barrier people face when looking for a job in the food processing industry. Many entry-level candidates are missing the fundamentals required to work in the food industry. These include personal hygiene, food safety, warehousing and shipping of food and rotating stock.

Unlike the employer groups, the employees indicated that turnover was an issue in the industry. This group feels their high turnover rate is due to low wages and working conditions. Employees indicated that extreme heat, extreme cold and dusty working conditions can contribute to turnover. Low wages also contribute to turnover. One participant commented that if a company were willing to pay higher wages, they would attract people who have experience in the industry and motivation for the job.

A relaxed and jovial working atmosphere was identified as key to why individuals choose to stay in the food processing industry. As well, companies who offer incentives to their employees for learning and skills development will likely see a decrease in turnover. With the current push to value-added processing, participants believe that most employees will choose to remain in the

food processing industry. This is thought to be due to specialized skills development which cannot be easily transferred to other industries. As well, employees who develop special skills have greater opportunity within the industry to find better paying work with more responsibility.

Participants were asked if there was a trend in food processing employees relocating to other provinces, such as Alberta, Manitoba or British Columbia. There have been a number of skilled employees who have found better opportunities outside of Saskatchewan. Many others would also consider relocating but personal reasons such as family keep them in Saskatchewan.

4.3.2 Skills and Training

Participants identified technical and employability skills people need to get and succeed in a job in the food processing industry. Technical Skills include personal hygiene, food safety, warehousing and shipping of food, rotating stock, mechanical skills and forklift operation. Communication skills, personal hygiene, and anger management are important employability skills. In addition, the ability to listen and ask questions were also rated very high among this group.

Participants also had recommendations for management skill development. They feel that management must create an atmosphere at work that allows employees to ask questions, no matter how trivial they may appear. Mangers must provide new employees an overview of the entire organization and how they fit into it. They must review the employees responsibilities and ensure they understand them. Communication between management and employees is key. Employers cannot expect a new employee to automatically know how to do every aspect of the job. They have to expend effort and training to ensure the employee has the opportunity to learn.

The majority of food processors in Saskatchewan are small businesses and often cannot afford outside training. However, employees felt that having an outside trainer come in would be better received by employees than in-house training delivered by a supervisor. Any training program offered to employees by the company must be accompanied by indications that it is directly related to their work. If they know they will be taking on more responsibilities at work because of the training and will benefit in the future, they will take training more seriously. If an employee is sent out for training without these types of incentives, they would be more likely to treat it as time off. Training for employees in the industry offered by the SFPA should be in areas that are non-specific. That is, they should be applicable across the industry and not restricted to one area.

4.3.3 Training Information

Participants were asked what kinds of training they would want to receive. Personal hygiene, first aid, safety around equipment and documentation training were mentioned. The issue of little time and little extra money was raised once again concerning small business. It is believed that there are additional benefits to bringing a trainer into the workplace rather than sending the employees to another site. If employees are asked to attend a training session elsewhere, it is

believed control measures need to be in place. Asking for a two page report is thought to make a large difference in an employees attention level. Also, when employees are taking the time from work to go to these courses, the shift is often disrupted and productivity is down. Bringing a trainer in would allow the shift to keep running.

There is a real need as the food industry grows for quality assurance work. It is believed there is currently a shortage in the industry. One participant suggested employees partake in periodic training in this area over a period of two to three years rather than all at once.

4.4 GROUP #4 – UNIONIZED EMPLOYEES

4.4.1 Recruitment and Retention

Participants were asked their opinions on the biggest barrier people face when looking for a job in the food processing industry. Participants indicated that nepotism within the company is a problem. And like participants in other groups, they said that automation is shrinking the job market.

Unlike the non-union employee group, the unionized employees indicated that turnover was not an issue in the industry. This group feels that high pay is a key reason people stay in the industry. Another factor that keeps turn over low is employees who have a long-term view of employment in the industry. Working in food processing becomes a family tradition, where generations may stay with one company. As well, employees look at their jobs from a long-term perspective, and may not like the alternatives, such as construction. One of the participants indicated that negative factors may keep employees in the job. Because employees do not get formal recognition for the work they do, they have no formal qualifications when they decide to leave, which makes transition to another industry difficult.

The unionized employees identified a number of reasons people may leave the industry. Lack of reward, incentives, and no chance for promotion are key reasons people leave. The monotony of the work is also a factor. One participant called it rote work.

Participants were asked what might entice a person to leave their job. Participants identified money as a key factor, either in the form of a severance from their current employer or better pay in another job. The other key factor was stable, full-time employment. Participants said people would leave their jobs if they had an opportunity for full-time or long-term work elsewhere.

People who leave the industry often change careers completely or become self-employed. The perception of the participants is that some people leave the province, but many do not. Of those people who leave the province, lower taxes, better pay and full time work are the attractive features. Those who stay do so because they have a long-term commitment to their jobs, benefits and family and friends here.

4.3.4 Skills and Training

Communication skills, people skills and common sense are important employability skills in the industry. Participants said employees must be punctual and be able to work alone. They must have logic skills in order to reason out how things work, and to think ahead when making decisions. In terms of technical skills, mechanical skills including understanding machinery and knowing how to fix it are important. Organizational skills are needed in order to prioritize work, rotate stock and plan the loading of trailers.

The unionized employees said they would like to be trained in computers, general process knowledge, and technical aspects of the industry such as PLC and electronics. Due to the computerization of equipment, computers skills are becoming increasingly important. Change will be continual and employees need to understand how equipment works. As one participant commented, "It's different than the old machines."

Participants indicated that hands-on, on-the-job training is the best way to learn. Learning in the workplace allows the employee to see how and why something is done. Information retention is higher when learning on the job.

On-the-job training is an asset, but there are some difficulties in delivering training. A shortage of labour makes it difficult to take people off the line. As well, time constraints mean only the basics are taught, and some employees want more in-depth training. The participants said that their company is very willing to offer training, but the budget and lack of labour means only a minimum of training is done. Examples of this training include forklift, safety and on-the-job training, such as watching an operator. Participants said that all employees have access to training and the company is willing to train. Training is not tied to promotion or advancement other than for management.

4.3.5 Training Information

Participants were asked what kinds of training information they would want to receive. Suggestions included problem solving, trouble shooting, and breaking a problem into steps. They would like basic information about who to contact and how to start looking for training. If they ever left the food processing industry they would need to retrain. As one participant commented, "I've been on the job so long that if I ever had to go out, I'd need training."

5.0 Recommendations & Strategies

Recommendations

 # 1: *Develop a long-term strategy and provincial training team to address Saskatchewan food processing industry training needs.*

Objectives	*Action Steps*	*Partners*	*Possible Timelines*
1. Develop partnerships with stakeholders that represent industry, education & training providers, labour and government	• Presentation of study • Communicating/disseminating information (develop communications strategy) • Increase dialogue between trainers & educators to develop mutual understanding of everyone's activities and plans • Identify sector partnership partners and what role each can play • Determine a suitable schedule of meetings for the sector partnership	SIAST Unions Regional Colleges Aboriginal institutions HRDC PSEST Universities SFPA Food Centre	Within next 6 months
2. Identify and develop courses to address short term needs.	• Work with representatives from various industries that make up the sector so they decide what courses, and approve course content. • Identify existing courses to meet those needs. • Determine applicability of those courses • Modify existing applicable courses	Prairie Swine Centre (possibly modify HR courses) SIAST Food Centre Industry associations Universities Unions	12 – 18 months
3. Identify and develop courses that are transferable within the sector to address long term needs.	• Identify common core needs. • Develop training to address training gaps. • Establish a system of Prior Learning Assessment Recognition for use by industry • Develop an evaluation process	Industry SFPA Food Centre SIAST Universities	Long term

		Industry associations SLFDB	
4. Develop accreditation process that indicates a course is approved by industry and/or a post-secondary institution.	• Partner with SIAST to get approval/SIAST accreditation • Partner with universities • Partner with national industry associations • Gain approval from government (ie SaskHealth, SAF) • Develop a mechanism for employer/industry recognition	Industry SFPA SIAST Universities PSEST Provincial government SIIT DTI	Long term
5. Develop an evaluation process for short and long term training & education courses and programs.	• Work with trainers, educators and industry to develop & implement the evaluation process	SIAST SIIT DTI Universities SFPA Industry	Long term and on going

 # 2: *Develop an effective communication strategy to assist industry and individuals in assessing all food processing related training opportunities in the province.*

Objectives	***Action Steps***	***Partners***	***Possible Timelines***
1. Develop a communication process that provides information in a timely manner, is relevant to the industry, is readable and accessible and can be delivered in a cost effective manner.	• Make presentations to stakeholders/partners • Include information in newsletter and on website • Work with unions • Speak at conferences about training • Involve federal and provincial government • Make presentations to Aboriginal employment and training organizations • Make presentation to SLFDB and provincial	SIAST Universities Food Centre Regional Colleges Private trainers Unions/UFCW SFPA WD SECD	Immediate: • Get information out in industry and government newsletters Long term • Develop strategies as the group works

	government • Develop relationships with stakeholders with the goal of including them in the partnership • Ensure all stakeholders, especially industry, are aware of what's available and how they access it	SAF PSEST Federal Government SaskHealth DTI SIIT	together
2. Make industry aware of the value of investment in training	• Gather and distribute testimonials • Develop industry training champion programs • Develop industry mentorship program where companies speak to other companies about what they learned and benefits provided to them. • Develop relationships with the media to enhance industry and training profile	Industry Training providers Unions SFPA Food Centre SLFDB	Short & long term
3. Update communication strategies on a regular basis.	• Develop a multi-party agreement to fund this update.	SFPA SECD Food Centre HRDC AFIF Industry	To be determined based on communications strategy (SFPA responsible)

4. Establish a process for organizing meetings with education and training providers to review and discuss the reports and training database.	• Conduct a meeting with education & training providers • Presentation of report at meeting • Discuss forming a provincial working group • Develop joint strategy	SIAST UFCW SFL U of S Extension U of R DTI SIIT Regional Colleges WD Industry Food Centre/SAF PSEST HRDC SECD SLFDB Business Development Bank of Canada	Short term (prior to end of June 2000)

 # 3: *Develop a funding strategy.*

Objective	***Action Steps***	***Partners***	***Possible Timelines***
1. Identify appropriate funding sources (SFPA to take the lead).	• Identify funding for design and development of training • Identify funding to help industry access training • Include funding agents in provincial training team • Develop a process to access funding • Communicate funding opportunities to industry via communications strategy	SAF PSEST HRDC CARDS	Short term and on-going

 # 4: *Create an environment that encourages the development, retention and recruitment of a skilled workforce.*

Objectives	***Action Steps***	***Partners***	***Possible Timelines***
1. Develop a marketing plan to promote career opportunities to youth, underemployed and unemployed in Saskatchewan and promote the industry to attract people from outside the province.	• Explore co-op and workplacement programs between industry and training providers • Integrate with present communication strategy • Educate government on the food processing industry	Universities SIAST Technical training providers SFPA Food Centre CSCES HRDC Aboriginal institutions Provincial government	Short term and on going
2. Encourage the industry to become more involved in promoting opportunities in the industry.	• Participate in career days, high school workplacement programs, junior achievement, and others • Develop partnerships between industry and education & training providers to work towards creating a positive work environment	Industry SFPA Training Providers High Schools SLFDB PSEST All Sector Partnerships	

 # 5: *Work to create a forum for all industries to work together.*

Objective	Action Steps	Partners	Possible Timelines
1. Develop a province wide approach to address Saskatchewan human resource and training needs.	• Approach SLFDB to co-ordinate a workshop to develop a provincial strategy.	SFPA UFCW SLFDB PSEST All Sector Partnerships Dept. of Education SLFDB	Long term

6.0 Next Steps

The Saskatchewan Food Processing Industry Sector Partnership has formulated an opportunity for future and ongoing human resource development and training through this project. The need for a long-term strategy to address the industry's training needs, along with effective communication strategies and creating an environment for development, retention and recruitment of a skilled workforce, are important aspects to undertake.

To begin the process to implement the recommendations and the objectives set by the Steering Committee, the industry and the Saskatchewan Food Processors Association must undertake the following steps:

1. The Saskatchewan Food Processors Association must organize a meeting with key stakeholder representatives and the education and training partners to enhance the Steering Committee so they can begin to priorize and develop strategies for implementing the objectives set forth in this report.

2. The members of the Steering Committee undertake initiatives to communicate the research findings to their representative members and organizations.

   It is noted the research and report has already been presented to the Board of Directors of the Saskatchewan Food Processors Association and to the affected locals of United Food & Commercial Workers Local 1400. The results have been the acceptance of the study by the Board of Directors of the Saskatchewan Food Processors Association and the two locals of United Food and Commercial Workers Union have submitted names of interested members to assist with Phase Two of the initiative.

3. The Saskatchewan Food Processors Association produce and distribute the results of the study using a variety of means to ensure coverage and communication to the industry.

4. The Saskatchewan Food Processors Association in co-operation with Saskatchewan Post-Secondary Education and Skills Training prepare a news release to announce the completion of the study and the next steps.

5. The enhanced Steering Committee to begin with the Saskatchewan Labour Force Development Board to develop a province wide approach to address the human resource and training needs for Saskatchewan industries.

7.0 Acronym Key

Throughout the term of the project, numerous acronyms were used by members of the Steering Committee and when conducting the research. To assist the readers of this report, an acronym key was developed and included in this report.

AFIF = Agri-Food Innovation Fund
CARD = Canadian Adaptation and Rural Development
CSCES = Canada Saskatchewan Career & Employment Services
DTI = Dumont Technical Institute
HRDC = Human Resources Development Canada
PSEST= Post Secondary Education and Skills Training
SECD = Saskatchewan Economic & Cooperative Development
SFL = Saskatchewan Federation of Labour
SFPA = Saskatchewan Food Processors Association
SLFDB = Saskatchewan Labour Force Development Board
SIAST = Saskatchewan Institute of Applied Science & Technology
SIIT = Saskatchewan Indian Institute of Technologies
UFCW = United Food & Commercial Workers
U of R = University of Regina
U of S = University of Saskatchewan
WD = Western Economic Diversification

APPENDIX A: Literature Review

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1.0 Introduction

1.1 Report Context

The food processing industry is becoming an increasingly important and dynamic part of Saskatchewan's economy in terms of job creation, investment, exports and processing of the province's abundant agricultural resources. This industry is undergoing a period of change due to new technology, changing skill requirements, and increasing standards.

The formation of a sector partnership for the food processing industry will provide a primary focus for those companies that are presently involved in the industry in Saskatchewan to address human resource issues and training needs.

The food processing industry in Saskatchewan is defined as operations involved in the processing of:

- *Meat*
- *Bakery products*
- *Prepared and specialty foods*
- *Dairy products*
- *Fruit and vegetables*
- *Cereal products and grains*
- *Other food products*

Currently, the industry in Saskatchewan employs over 6,500 people, up from 1997's total of under 6,000.[1] There is a need to determine where the growth is occurring and what specific human resource issues and training needs are resulting from the growth. Given the size and diversity of the industries represented, the most efficient manner to address these human resource and training needs is through the formation of a Sector Partnership.

[1] Saskatchewan Food Processors Association, 1998

1.2 Report Objectives

The objective of this report is to document the findings from a literature search in the following areas:

- Provide an overview of the food processing industry, including the type and number of companies involved in the sector and current employment levels;
- Discuss human resource and training issues; and
- Identify any critical issues that should be addressed through further primary research.

2.0 Methodology

The literature obtained for the literature review portion of the report is limited to those publications dated 1991 to the present to ensure that only current information was included.

3.0 Overview of the Industry

3.1 Industry Composition

The food processing industry in Saskatchewan is defined as operations involved in the processing of:

- *Meat*
- *Bakery products*
- *Prepared and specialty foods*
- *Dairy products*
- *Fruit and vegetables*
- *Cereal products and grains*
- *Other food products*

Companies in the food processing industry compete in a wide range of traditional and new food products.[2] A large percentage of companies compete in meat production and bakery products; however, 27% of production is comprised of specialty foods, fruit products, and spices/condiments.[3]

3.2 Size of the Sector

Over 6,500 people work in the industry.

The food processing industry employs over 6,500 people in 288 companies.[4] Food processing is Saskatchewan's main manufacturing industry and accounts for 27% of total manufacturing output.[5] In 1997, the food processing industry contributed $2 billion to the provincial economy.[6] The 1997 report on food processing prepared by the Canada West Foundation shows that since 1993 Saskatchewan has lead the growth in food processing in this region at a rate of 32%.

Saskatchewan food processors sell their products locally, in other provinces, and internationally. Saskatchewan food exports have increased by almost 90% since 1993, which is the highest increase in the nation.[7] Primary export markets include USA, Japan, South Korea, and Mexico.[8]

Most food processors in Saskatchewan are small to medium sized companies and 80% employ less than 20 people. Larger establishments are found in meat packing and poultry and diary processing.[9]

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[2] Saskatchewan Economic and Cooperative Development, Food Processing Profile.
[3] Saskatchewan Food Processors Association, Food for Thought, December 1997.
[4] Saskatchewan Food Processors Association, Saskatchewan Food Industry Directory, 1998.
[5] Saskatchewan Economic and Cooperative Development, Food Processing Profile.
[6] Saskatchewan Food Processors Association, Food for Thought, December 1997.
[7] Saskatchewan Economic and Cooperative Development, Food Processing Profile.
[8] Agriculture and Agri-Food Canada, The Canadian Food and Beverage Processing Sector: An Overview of the Opportunities and Challenges at the Turn of the Century, May 1998.
[9] Agriculture and Agri-Food Canada, The Canadian Food and Beverage Processing Sector: An Overview of the Opportunities and Challenges at the Turn of the Century, May 1998

3.3 Workforce Profile

Information about workforce demographics in the food processing industry in Saskatchewan is presented in the following sections.

3.3.1 Age Groups

The Saskatchewan Sector Study conducted by Trimension Group explored the issue of age demographics in the industry. The results are summarized in the following table:

Table 1: Employee Age Level for the Food Processing Industry

Sample Size = 19	15-24	25-34	35-44	45-54	55 AND OVER	Total
Total # of Employees	317	782	839	547	220	2,705
Total % of Employees	12%	29%	31%	20%	8%	100%
Provincial Averages	17%	27%	25%	16%	15%	100%

(Source: Trimension Group, Saskatchewan Sector Study: Agri-value Report, July 1997. Prepared for Canada-Saskatchewan Strategic Initiatives)

A young industry compared to provincial averages.

Compared to provincial averages for overall employment, the food processing industry is somewhat younger with the proportion of those aged 25-44 years being higher.

3.3.2 Education

Table 2 presents the number of employees in each education category. The table includes both full and part-time employees and shows that 15% of employees in the food processing industry have a post-secondary certificate or diploma; however, 38% have their Grade 12 diploma as their highest level of education.

Table 2: Employee Education Level for the Food Processing Industry

n = 128	< Grade 9	Grade 9 - 12	High School Completion	Some Post-Secondary	Post-Secondary Certificate or Diploma	Univer-Sity Degree	Total
Total # of Employees	245	1,046	1,384	279	529	159	3,642
Total % of Employees	7%	29%	38%	8%	15%	4%	100.0 %
Provincial Averages	9%	27%	13%	35%	5%	11%	100%

(Source: Trimension Group, Saskatchewan Sector Study: Agri-value Report, July 1997. Prepared for Canada-Saskatchewan Strategic Initiatives)

38% of workers have a Grade 12 diploma.

Women, visible minorities, and people with disabilities are under-represented.

3.3.3 Equity Statistics

Information on the participation rates of women, Aboriginals and visible minorities is presented in this section.

Eight percent of employees in the sector are Aboriginal, which is above the provincial average while 4% are wholly, Aboriginally-owned. Although it is stated that the Aboriginal employment in this sector rate is above the provincial average, it is projected that the Aboriginal population in Saskatchewan will increase substantially in the next 15 years with the majority of Aboriginal people being of working age.[10] This change will have a dramatic impact on our labour force demographics in terms of both age and cultural issues.

Persons with disabilities, visible minorities, and women may be under-represented in the industry.[11]

3.3.4 Earnings

Census data from 1991 indicates that the average worker in the food processing industry in Saskatchewan earns $30,000 compared to a provincial average of $28,000 for all workers.[12] According to the Saskatchewan Sector Study, the average gross annual income of owners, managers, and supervisors in the industry is $55,000.[13] The average gross annual income of professional and technical staff and labourers is $30,000 - $49,999. Marketing and sales employees average $40,000 a year. Office, clerical, and support staff tend to earn, on average, $20,000 to $29,999 per year.[14]

3.3.5 Location

The industry is very rural based as over half of companies (59%) are located in rural communities. Almost three-quarters (72%) are located outside our largest centres of Saskatoon and Regina.[15]

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[10] Federation of Saskatchewan Indian Nations. *Saskatchewan and Aboriginal Peoples in the 21st Century: Social, Economic and Political Changes and Challenges*. 1997.
[11] Trimension Group, Saskatchewan Sector Study: Agri-value Report, July 1997. Prepared for Canada-Saskatchewan Strategic Initiatives.
[12] 1991 Statistics Canada Census Data.
[13] Trimension Group, Saskatchewan Sector Study: Agri-value Report, July 1997. Prepared for Canada-Saskatchewan Strategic Initiatives.
[14] Trimension Group, Saskatchewan Sector Study: Agri-value Report, July 1997. Prepared for Canada-Saskatchewan Strategic Initiatives.
[15] Saskatchewan Food Processors Association, Food for Thought, December 1997.

3.4 Industry Trends and Issues

Technology

Past research suggests that some issues affecting the industry revolve around technological advancement and skills specialization. In order to be competitive, processors must minimize costs. One way to do this is to automate production processes. More processors are relying on computer controlled and automated equipment to prepare their products. This is impacting companies in terms of the needs for new equipment and accompanying skills training. With the increase in automation in food processing, there is less need for physical skills and a greater requirement for communication, analytical skills, and problem-solving.[16] In addition, to successfully adopt new technologies, employees must have a certain level of literacy and numeracy skills. Basic literacy skills are also required for providing training on more advanced skills.

Quality

Another related issue is that of quality systems. Total Quality Management (TQM) and Hazardous Analysis and Critical Control Points, and ISO standards are being implemented as companies strive for safety, consistency, visual appeal, and nutrition.[17] More domestic and foreign buyers are requiring that processors follow standardization guidelines. The implementation of quality systems challenges the industry in terms of the requirements needed to re-engineer production lines, the substantial capital investment required, and the increase staff training. This may be especially challenging for Saskatchewan food processors, many of which are small to medium size operations.

Consumer Trends

Consumer driven trends include the influence of the Baby Boomers on the food market and the need for processors to understand the market and develop products and marketing strategies to meet their needs.[18] Other trends identified include increased demand for ethnic foods and health and organic foods. Specialty items are a potential niche market for Saskatchewan processors, including an increased demand for specialty meats. It is expected the specialty food industry will continue to grow as consumers demand product quality and freshness. Another opportunity lies in providing ready-to-eat foods for busy families.

Other trends in consumer demand include:[19]

- Higher consumption of poultry;
- Decrease in consumption of red meat;
- Increase consumption of grain and cereal products and fruits and vegetables; and
- Greater use of nutraceutical products or health foods.

Consumers also want to see less or more environmentally friendly packaging as well as more variety in terms of nutritious but convenient foods.[20]

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[16] The Canadian Grocery Producers Joint Human Resources Committee, Project Partnership: The Basic Skills Pilot Project, March 1995.
[17] Agriculture and Agri-Food Canada, The Canadian Food and Beverage Processing Sector: An Overview of the Opportunities and Challenges at the Turn of the Century, May 1998.
[18] Saskatchewan Agriculture and Food, An Analysis of the Food Processing Industry, 1998.
[19] Agriculture and Agri-Food Canada, Global Food Market Trends, December 1995.

Growth Markets

Meat processing, which comprises 35% of the food processing industry in Saskatchewan, is a growing market with a large number of meat processors. Twelve of these are federally inspected facilities and there is a growing base of specialty livestock operations such as bison, elk and deer, wild boar, and goat. The fruit industry also has growth potential, particularly in Saskatoon berries, chokecherries, and sea buckthorn.[21]

Globalization

Globalization is affecting companies in terms of the need for highly trained workers to provide high-quality products to the global market, as well as creating more competition for companies while at the same time opening new markets to Saskatchewan companies.[22] While some companies are exporting, particularly to the USA, the industry must further develop opportunities in other markets such as South America. In addition, many companies lack the experience and expertise to venture into export markets. As more and more companies export, there will be a need for specific exporting skills, such as:[23]

- Interpersonal skills such as communication, negotiation and social skills.
- Knowledge of foreign markets and culture.
- Technical skills such as knowledge of exporting, marketing, distribution and logistical planning.

To be able to take advantage of international markets, Saskatchewan must also invest in technology and transportation infrastructure. Horizontal and vertical alliances are also needed to improve financial strength, supply capability, and market access.[24]

Employment Equity

There is a need to ensure that there is equitable representation of women, Aboriginal peoples, and visible minorities in food processing. This may require special training or recruiting strategies to tap the increasingly diversified workforce.

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[20] Ralph Hicks, Hicks & Company for the Food Development Division, Agriculture and Agri-Food Canada, Consumer Food Trends for the 1990s.
[21] Saskatchewan Agriculture and Food, An Analysis of the Food Processing Industry, 1998.
[22] Trimension Group, Saskatchewan Sector Study: Agri-value Report, July 1997. Prepared for Canada-Saskatchewan Strategic Initiatives.
[23] Trimension Training & Consulting and The Advisory Group Inc. for Pan Western Food Beverage Canada Industrial Adjustment Service Committee, Human Resource Needs Assessment Study for the Pan Western Food and Beverage Processing Industry, March 1996.
[24] Agriculture and Agri-Food Canada, The Canadian Food and Beverage Processing Sector: An Overview of the Opportunities and Challenges at the Turn of the Century, May 1998.

3.5 Human Resource and Training Issues

3.5.1 Employment Levels

Over 6,000 people work in this industry. Table 3 presents the top ten occupations in the industry, according to National Occupational Classification (NOC) code and 1991 Census Data.

Table 3: Top Ten Occupations in the Food Processing Industry

NATIONAL OCCUPATIONAL CODE AND NAME	EMPLOYMENT
946 Machine Operators and Related Workers in Food, Beverage, Tobacco Processing	1,045
961 Labourers in Processing, Manufacturing and Utilities	635
741 Motor Vehicle and Transit Drivers	500
641 Sales Representatives, Wholesale Trade	275
625 Butchers and Bakers	195
745 Longshore Workers and Material Handlers	170
731 Machinery and Transportation Equipment Mechanics (exc. motor vehicle)	150
147 Recording, Scheduling and Distributing Occupations	130
921 Supervisors, Processing Occupations	120
143 Finance and Insurance Clerks	115

The two largest occupations include labourers in processing and machine operators and related workers and are high growth occupations as well. In addition there may be underskilled workers among:[25]

- Labourers in processing,
- Machine operators and related workers
- Butchers and bakers
- Machinery and transportation equipment mechanics

[25] Trimension Group, Saskatchewan Sector Study: Agri-value Report, July 1997. Prepared for Canada-Saskatchewan Strategic Initiatives.

3.5.2 Skill Requirements

A major challenge to the industry is continued upgrading of the labour force's skills and marketing and management skills.[26] The Saskatchewan Sector Study identified skill requirements, deficiencies, and emerging skills for the industry (Table 3).

Table 4: Skill Requirements in the Food Processing Industry

SKILL REQUIREMENTS	SKILL DEFICIENCIES	EMERGING SKILLS

• Academic skills
  • Industry specific skills (54)
  • Technical skills (24)[27]
  • Communication skills (20)
  • Business skills (20)[28]
  • Basic skills (17)[29]
  • Computer skills (13)
• Personal mgt skills (64)[30]
• Teamwork skills (32)
	• Academic skills
	  • Technical skills (8)
	  • Basic skills (10)
	  • Business skills (19)
	  • Industry specific skills (24)
	  • Computer skills (11)
	  • Communication skills (3)
	• Personal mgt skills (15)
	• Teamwork skills (12)
		• Academic skills
		  • Computer skills (67)
		  • Industry specific skills (57)
		  • Technical skills (38)
		  • Business skills (43)
		  • Communication skills (6)
		  • Basic skills (3)
		• Personal mgt skills (21)
		• Teamwork skills (5)

(Source: Trimension Group, Saskatchewan Sector Study: Agri-value Report, July 1997. Prepared for Canada-Saskatchewan Strategic Initiatives)

Respondents indicate that in this industry there is a strong requirement for employees with personal management skills, industry specific skills, and teamwork skills. Examples of these skills mentioned by respondents include:

Personal management skills
- Willing to work
- Punctual
- Clean
- Take direction

Industry specific skills
- Knowledge of food industry
- Product knowledge
- Food sanitation
- Quality control

Teamwork skills
- Work as part of a team/assembly line
- Understand it is a team effort

[26] Agriculture and Agri-Food Canada, The Canadian Food and Beverage Processing Sector: An Overview of the Opportunities and Challenges at the Turn of the Century, May 1998.
[27] Technical skills include: welding, mechanical, and electronic skills as well as operation of machinery
[28] Business skills include: management, marketing, and financial skills
[29] Basic skills include: literacy, reading, and math skills
[30] Personal management skills include: time management and motivation

There is a strong requirement for employees in the food processing industry to have teamwork skills and a good work ethic. Industry specific skills are generally related to an understanding of the industry and the product and food safety. This is generally the area where employees are seen as most deficient.

New skills required by the food processing industry include computer skills, industry specific skills, business skills, and technical skills. Examples of these skills mentioned by respondents include:

Computer skills
- Programming
- Computerized equipment knowledge
- Computer marketing

Industry specific skills
- Meat cutting skills
- Ingredient proportions
- Quality control
- Food handling
- HACCP

Business skills
- Marketing
- Human resource management
- Exporting

Technical skills
- Improved equipment operations and mechanics
- Operate new machinery
- Operate a packaging machine

New skills are generally related to an increase in the quality of the product and changes in health or sanitation requirements. In addition, employees will require skills to work with new and/or computerized equipment.

There is a need for basic management skills for small food processors. "The high failure rate among small businesses is most often attributed to poor management training rather than to a problem with the product offered by the business."[31] Some of the management skills required include:

- Financial management
- Marketing
- Strategic planning

[31] Agriculture and Agri-Food Canada, Training and Education in the Agri-Food Industry, June 1993.

For larger food processors there is also a requirement for management skills training. These skills include:

- Team building skills
- Supervisory skills
- Marketing skills

Many companies expect jobs to become more specialized largely due to greater automation and use of new or computerized equipment. Greater specialization is also seen as necessary as companies continue to grow and become more efficient.

3.5.3 Recruiting and Retaining Employees

It is difficult to attract workers to mostly rural jobs.

The key barriers to gaining employment for employees within the industry are:[32]

- Need proper training and food processing experience
- Good work ethic
- High competition for jobs

Companies indicated they experienced the following difficulties in recruiting and retaining qualified workers:[33]

- Not being able to attract to rural locations
- Unable to offer competitive wages
- No skilled/experienced labour available

Employee turnover may be an issue among food processors. Employees may leave voluntarily for the following reasons:

- Other employment opportunities
- Returning to school
- Health related reasons
- Retirements
- Unable to offer competitive wages

[32] Trimension Group, Saskatchewan Sector Study: Agri-value Report, July 1997. Prepared for Canada-Saskatchewan Strategic Initiatives.
[33] Trimension Group, Saskatchewan Sector Study: Agri-value Report, July 1997. Prepared for Canada-Saskatchewan Strategic Initiatives.

3.5.4 Training Activities

The Saskatchewan Sector Study of the Agri-Value Sector reported that 56% of companies in the food processing industry in the province undertake training of their employees, with the most do so through internal programs of on-the-job training, HACCP and quality control training, and orientation.[34] Companies also use external training programs, specifically SIAST or regional college courses, safety, as well as business education such as computers, management, and marketing training.

Many companies' training needs are not being met.

Many in this industry do not feel that training programs currently offered within Saskatchewan meets their companies needs. Companies would like to see more training offered in the areas of baking, complete food processing training programs, meat cutting courses, and more accessible courses.[35]

[34] Trimension Group, Saskatchewan Sector Study: Agri-value Report, July 1997. Prepared for Canada-Saskatchewan Strategic Initiatives.
[35] Trimension Group, Saskatchewan Sector Study: Agri-value Report, July 1997. Prepared for Canada-Saskatchewan Strategic Initiatives.

4.0 Summary

The following points summarize the key findings. More in depth research can be conducted on the most crucial issues as identified by the Sector Partnership Steering Committee.

4.1 Description of the Industry

The food processing industry in Saskatchewan is defined as operations involved in the processing of:

- *Meat*
- *Bakery products*
- *Prepared and specialty foods*
- *Dairy products*
- *Fruit and vegetables*
- *Cereal products and grains*
- *Other food products*

Companies in the food processing industry compete in a wide range of traditional and new food products. A large percentage of companies compete in meat production and bakery products; however, 27% of production includes specialty foods, fruit products, and spices/condiments.

Currently, there are approximately 288 food processors in Saskatchewan employing over 6,500 people. Food processing is a major contributor to our provincial economy (over $2 billion) and is growing in domestics and international sales.

4.2 Workforce Profile

The industry workforce is young with average education levels (high school diploma). Persons with disabilities, visible minorities, and women are under-represented in this industry. Most food processors (72%) are located in rural areas which has an impact on recruiting, retaining, and providing continuous education for the labour forces.

4.3 Industry Trends and Issues

Some issues affecting the food processing industry include:

- More reliance on computer-controlled and automated production equipment. This is having an impact on skill requirements in terms of employees needing more communication, problem solving, and analytical skills.
- Implementation of quality control systems and Hazardous Analysis and Critical Control Points (HACCP)
- There is increased demand for ethnic foods, health food and nutraceuticals, premium goods, specialty foods and specialty meats
- Growth potential for meat processors and fruit in Saskatchewan.
- Globalization is impacting Saskatchewan food processors by opening up new market while increasing competition in domestic markets. Food processors will need international marketing skills to further develop their export market opportunities.
- There is a need to ensure adequate representation of women, Aboriginal peopled, and visible minorities in the industry through innovative training and recruiting strategies.

4.4 Human Resource and Training Issues

The two largest occupations include labourers in processing and machine operators and related workers and are high growth occupations as well. In addition there may be underskilled workers among:

- Labourers in processing,
- Machine operators and related workers
- Butchers and bakers
- Machinery and transportation equipment mechanics

Respondents indicate that in this industry there is a strong requirement for employees with personal management skills, industry specific skills, and teamwork skills. Employees may be deficient in industry-specific skills such as a general understanding of the industry and food safety. Smaller processors may be lacking in management expertise.

New skills required by the food processing industry are related to the increase in quality and safety standards and include computer skills, industry specific skills, business skills, and technical skills. Employers expect jobs in their companies to become more specialized as they grow and become more efficient.

The key barriers to gaining employment for employees within the industry are:

- Need proper training and food processing experience
- Good work ethic
- High competition for jobs

Companies indicated they experienced the following difficulties in recruiting and retaining qualified workers:

- Not being able to attract to rural locations
- Unable to offer competitive wages
- No skilled/experienced labour available

Half of food processors provide training for their employees, with many companies using on-the-job training or courses in quality control or HACCP. Training at SIAST and the regional colleges are also used to a lesser degree including course in business education as well as industry-specific courses. Companies would like to see more training offered in the areas of baking, complete food processing training programs, meat cutting courses, and more accessible courses.

APPENDIX A

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This training database has been compiled by Trimension Training & Consulting Group on behalf of the Saskatchewan Food Processing Sector Partnership.

Accredited Education and Training

Saskatchewan

Technical Education & Training

Institution	Program	Description	Length	Method of Delivery	Contact Information
University of Saskatchewan	Bachelor of Science in Agriculture: Food Science	The Food Science specialization emphasized the application of the basic sciences to the food processing industry. This option prepares students for employment in the food processing industry, government or private research laboratories, or food regulatory agencies.	4 years	Classroom/Labs	University of Saskatchewan College of Agriculture 2D30 – 51 Campus Drive Saskatoon SK S7N 5A8 (306) 966-7881 www.usask.ca
University of Saskatchewan	Bachelor of Science in Food Science	Offered through the College of Arts & Science. The program is designed for students who have a strong interest in the basic sciences and wish to apply this knowledge to the selection, preservation, packaging, distribution and use of safe, nutritious and wholesome food.	4 years	Classroom/Labs	University of Saskatchewan College of Arts 9 Campus Drive Saskatoon SK S7N 5A5 (306) 966-4231 www.usask.ca
University of Saskatchewan	Food Additives and Toxicants	Introduction to the types of food additives in the industry, & the function of chemical compounds. Includes the safety of additives, toxicological information & the addition of additives vs natural. Emphasis on natural toxicants in food.	4 months	Classroom	University of Saskatchewan College of Agriculture 2D30-51 Campus Drive Saskatoon SK S7N 5A8 (306) 966-7781 www.usask.ca

Institution	Program	Description	Length	Method of Delivery	Contact Information
SIAST – Kelsey Campus	Introduction to Plumbing and Pipefitting	Students are presented with theoretical & practical instruction in methods of plumbing installation, water supplies, & waste systems.	See contact	See contact	Offered as a special project through Off Campus programming at Kelsey Campus. Call (306) 933-7225 for further information.
SIAST – Kelsey Campus	Institutional Meat Cutting	This program teaches students to understand and perform the fundamental skills of meat cutting proficiency level needed in this trade. Students in this course are prepared for employment in packinghouses and large meat processing firms.	19 weeks	Classroom/Lab	SIAST Kelsey Campus Box 1520 Idylwyld Drive & 33rd Street Saskatoon, SK S7K 3R5 (306) 933-6350 www.siast.sk.ca
SIAST – Wascana Campus	Light Duty Cleaner	This program provides basic training in janitorial skills & is delivered in an on-the-job format supplemented by classroom & group instruction.	585 hours in length	Classroom/ On-the-job format	SIAST Wascana Campus P.O. Box 556 221 Winnipeg Street North Regina SK S4P 3A3 1-800-667-7730 www.siast.sk.ca
Prairie West Regional College	Commercial Baking	Includes baking from scratch, modern baking techniques, an introduction to purchasing & handling supplies & first-hand sales experience. Students receive certificate from SAIT & 1st year toward apprenticeship.	32 weeks	Classroom/Lab/ Work Experience	Prairie West Regional College 113 – 3rd Avenue W. Biggar SK S0M 0M0 (306) 948-3363 www.pwrc.sk.ca

Business Education and Training

Institution	Program	Description	Length	Method of Delivery	Contact Information
University of Saskatchewan	Bachelor of Commerce	Offers students core business education and a specialization in one of nine majors.	4 years	Classroom	University of Saskatchewan College of Commerce 185 – 25 Campus Drive Saskatoon SK S7N 5A7 (306) 966-4785 www.usask.ca
University of Saskatchewan	Business Administration Certificate Program	Offered in cooperation with the Extension Division. Designed to expose participants to a wide array of business topics.	8 course program for part-time students	Classroom	University of Saskatchewan Kirk Hall RM 330 117 Science Place Saskatoon, SK S7N 5C8 (306) 966-5563 www.usask.ca
SIAST – Palliser Campus	Business Diploma Program	Designed to provide the student with a sound knowledge of business practices & principles. Students develop the ability to relate & apply this knowledge in adapting to current social & economic problems.	2 years	Classroom/ Work Term	SIAST Palliser Campus P.O. Box 1420 Saskatchewan Street & 6th Avenue NW Moose Jaw, SK S6H 4R4 1-800-667-0055 www.siast.sk.ca
SIAST – Woodland Campus	Business Administration Certificate	This program provides training in the business skills required for entry level positions in government or industry.	1 year	Classroom	SIAST Woodland Campus P.O. Box 3003 1100 15th Street East Prince Albert SK S6V 6G1 1-800-667-9664 www.siast.sk.ca

Manitoba

Technical Education and Training

Institution	Program	Description	Length	Method of Delivery	Contact Information
Red River Community College	Baking, Commercial Certificate	Students develop basic baking skills and related requirements through classroom instruction, practical lab training, and off-campus work experience.	10 months	Classroom/Lab/ Work Experience	Red River Community College 2055 Notre Dame Avenue Winnipeg MB R3H 0J9 (204) 632-2161 www.rrcc.mb.ca
University of Manitoba	Bachelor of Science, Food Science	The B.Sc. degree program in Food Science provides the academic foundation of knowledge and skills for the wide range of activities in food science and technology. The principal areas covered are food processing, chemistry, analysis and safety.	4 years	Classroom/lab	The University of Manitoba Winnipeg, MB, R3T 2N2 248 Agriculture Building (204) 474-9295 agfoodsci@umanitoba.ca www.umanitoba.ca/afs

Alberta

Technical Education and Training

Institution	Program	Description	Length	Method of Delivery	Contact Information
University of Alberta	Bachelor of Science in Nutrition and Food Sciences	Three majors are offered: Food Science and Technology, Foods and Nutrition, and Nutrition. Covers components of fundamental and advanced nutrition and food science courses.	4 years	Classroom/lab	10 Agriculture/Forestry Centre University of Alberta Edmonton, AB, Canada, T6G 2P5 (780) 492-3239 chair@afns.ualberta.ca

Institution	Program	Description	Length	Method of Delivery	Contact Information
Lakeland College	Electrician - Apprenticeship	If you are interested in working in another province & have completed an apprenticeship program in one of the Red Seal trades, you can write an inter-provincial standards (Red Seal) exam. Journeyman who carry a Red Seal certificate are qualified to work in their trade anywhere in Canada where the trade is recognized.	Yrs 1, 2, 3 8 weeks Yr4 12 weeks	Classroom/Lab/ Work Experience	Lakeland College Vermilion Campus 5707 – 47 Avenue West Vermilion, AB T9X 1K5 1-800-661-6490 www.lakelandc.ab.ca
Northern Alberta Institute of Technology (NAIT)	Baking, Certificate	Students receive training in the art & science of bread making, cake & pastry making, and cake decorating. Students are taught baking theory, business concepts, communication skills and sanitation knowledge.	1 year (2-16 week semesters)	Classroom/Lab/ Work Experience	Northern Alberta Institute of Technology 11762 – 106 Street N.W. Edmonton AB T5G 3H1 (780) 471-6248 www.nait.ab.ca
Olds College	Meat Processing Certificate Program	The broad range of skills, techniques & training allows students to reach proficient levels in retail meat cutting, trimming, boning, breaking, wrapping, slaughter, sausage-making ,& curing, & gain an in-depth understanding of sanitation & bacterial control. Other areas include slaughter & proper operation of a retail meat counter.	5 months	Classroom/ Practicum	Olds College 4500 – 50 Street Olds, AB T4H 1R6 1-800-661-OLDS www.oldscollege.ab.ca/
Southern Alberta Institute of Technology (SAIT)	Baking, Commercial Certificate Program	Students learn techniques of purchasing, handling/storing ingredients & supplies. Equipment operation, pastry/cake decoration, sanitation, bakery management & nutrition. From basic principles to	1 year	Classroom/Lab Practicum	Southern Alberta Institute of Technology 1301 – 16 Avenue N.W. Calgary, AB T2M 0L4 (403) 282-6184 www.sait.ab.ca

		demonstrating quantity and quality production.			

Alberta

Business Education and Training

Institution	Program	Description	Length	Method of Delivery	Contact Information
Athabasca University	Advanced Graduate Diploma in Management (ADGM)	Designed to meet the ongoing educational needs of managers who do not wish to pursue an MBA. The program is identical to Phase One of the MBA program.	Approx. 14 months 6 courses	Distance	Public Affairs, Athabasca University 1 University Drive Athabasca, AB T9S 3A3 (780)675-6100 1 800 788-9041 www.athabascau.ca
Athabasca University	MBA Agriculture	In conjunction with the University of Guelph, this program is the first electronically delivered MBA focused on Agriculture. Courses include Business Policy for the Agri-Food Industry. The student is required to complete 10 courses, 1 project based dissertation and an In-Residence Study Week.	2 ½ to 3 years	Distance	MBA in Agriculture Program University of Guelph Room 221, MacLachlan Building Guelph, ON N1G 2W1 (888)-MBA-AGRI or (888) 622-2474 www.athabascau.ca
Athabasca University	Master of Business Administration	This executive management program looks at cases, tasks and challenges in a global context. The student is required to complete 12 courses, 2 comprehensive exams, 1 applied project and to attend 2 "theme" based weekend schools and 1 week long summer school during the program.	2 ½ to 3 years	Distance and 2 weekend schools and 1 week long summer school	Public Affairs, Athabasca University 1 University Drive Athabasca, AB T9S 3A3 (780)675-6100 1 800 788-9041 www.athabascau.ca
Athabasca University	Bachelor of Administration Program	This program is designed to provide students with the conceptual, critical, and practical knowledge	3 years	Distance	Public Affairs, Athabasca University 1 University Drive Athabasca, AB T9S 3A3

	Concentrations • Industrial Relations • Management • Organization	and skills needed to succeed and advance in the many competitive fields of management and administration today.			(780)675-6100 1 800 788-9041 www.athabascau.ca
Athabasca University	Bachelor of Administration (Post Diploma) Program Concentrations • Management • Organization	This focused, professional degree program builds upon the skills and knowledge acquired in a 2 or 3 year career or professional diploma program. Graduates will acquire the problem solving, critical thinking, and communications skills needed in the global marketplace along with administrative and managerial skills needed in today's organizations.	3 Years	Distance	Public Affairs, Athabasca University 1 University Drive Athabasca, AB T9S 3A3 (780)675-6100 1 800 788-9041 www.athabascau.ca
Athabasca University	Bachelor of Commerce	Bachelor of Commerce core courses and an increasing number of electives are available for study electronically on PC's in a learning environment called ViTAL. In addition, courses applicable to the program are offered to students in Calgary and Edmonton or at designed colleges.	Four Years	Distance	Public Affairs, Athabasca University 1 University Drive Athabasca, AB T9S 3A3 (780)675-6100 1 800 788-9041 www.athabascau.ca
Athabasca University	University Certificate In Accounting	This program is designed for students who want to develop skills and knowledge appropriate for an accounting professional. This program has been designed, with careful selection of options, complete the courses that make up the first 3 years of training required by professional accounting associations.	1 Year	Distance	Public Affairs, Athabasca University 1 University Drive Athabasca, AB T9S 3A3 (780)675-6100 1 800 788-9041 www.athabascau.ca
Athabasca University	University Certificate in Advanced	This program is builds upon the knowledge and skills students developed in the University	1 Year	Distance	Public Affairs, Athabasca University 1 University Drive Athabasca, AB T9S 3A3

	Accounting	Certificate in Accounting. Thus the University Certificate in Accounting (or its equivalent) is required for enrollment in the program. Upon completion, the student will be able to complete the transfer credit requirements for an accounting designation.			(780)675-6100 1 800 788-9041 www.athabascau.ca
Athabasca University	University Certificate in Administration	This program is designed for students who want both a broad perspective in administration and to develop administration skills.	1 Year	Distance	Public Affairs, Athabasca University 1 University Drive Athabasca, AB T9S 3A3 (780)675-6100 1 800 788-9041 www.athabascau.ca
Athabasca University	University Certificate in Labour Studies	This program is designed for students who want to know more about the position of labour and working people in society. The program would be of particular interest to trade unionists and both the leadership and general membership levels.	1 Year	Distance	Public Affairs, Athabasca University 1 University Drive Athabasca, AB T9S 3A3 (780)675-6100 1 800 788-9041 www.athabascau.ca
Athabasca University	University Certificate in Labour Relations	This certificate is an integrated, multidisciplinary program of courses that examines labour-management relations within their social, legal, political, and economic contexts. This program would be of interest to trade unionists, managers, human resource specialists, and individuals interested in a better understanding of the labour relations of their own workplace. Note: students may obtain either the University Certificate in Labour Relations or the University	1 Year	Distance	Public Affairs, Athabasca University 1 University Drive Athabasca, AB T9S 3A3 (780)675-6100 1 800 788-9041 www.athabascau.ca

		Certificate in Labour Studies. Students may not obtain both credentials.			

British Columbia

Technical Education and Training

Institution	Program	Description	Length	Method of Delivery	Contact Information
British Columbia Institute of Technology (BCIT)	Food Technology Seminars	Part-time courses for HACCP, sanitation, product development, microbiology, auditing HACCP systems, beer technology, wine technology & dairy processing.	Short courses/ workshops	Classroom/ Distance	Burnaby Campus 3700 Willingdon Avenue Burnaby BC V5G 3H2 (604) 434-5734 www.bcit.ba.ca
Malaspina University-College	Baking, Commercial	Pre-employment certificate program for those interested in the preparation of commercial baking. Training is offered in an industrial setting, in addition to theoretical subjects.	10 months	Classroom/Lab	Malaspina University-College 900 Fifth Street Nanaimo BC V9R 5S5 (250) 753-3245 www.mala.bc.ca
University of British Columbia	B.Sc. (Agr.) Major in Food Science	Develops knowledge in basic disciplines such as chemistry, biology, physics, mathematics and microbiology and applies these to the processing, preservation, storage, distribution and consumption of foods.	4 years	Classroom/ Distance/Lab	University of British Columbia 2329 West Mall Vancouver BC V6T 1Z4 www.ubc.ca/
Vancouver Community College	Baking & Pastry Arts (Full-time)	Prepares students for a career in the baking industry. Program is divided into 3 levels including bread & yeast dough products, puff pastry, pies, tarts, cookies, cake baking, cake decorating, pastries & chocolate.	10 months	Classroom/Lab	Vancouver Community College City Centre Campus 250 West Pender Vancouver BC V6B 1S9 (604) 443-8300 www.vcc.bc.ca
Vancouver	Baking & Pastry	Part-time courses offered in:	10	Classroom/Lab	Vancouver Community College

Community College	Arts (Part-time)	assorted breads, hard rolls, sweet yeast dough products, cake baking, cake decorating, chocolate work, marzipan, wedding cake decoration, chocolate making & sugar crafting.	sessions per course		City Centre Campus 250 West Pender Vancouver BC V6B 1S9 (604) 443-8300 www.vcc.bc.ca

Institution	Program	Description	Length	Method of Delivery	Contact Information
Vancouver Community College	Baking & Pastry Arts (Upgrade)	4 specialized areas of baking for those employed in the baking industry including 1) breads, rolls & yeast dough 2) pies, tarts, cookies, & pastries 3) cakes, French pastry, chocolate & marzipan 4) trades qualification.	1-4 months, depending on level	Classroom/Lab	Vancouver Community College City Centre Campus 250 West Pender Vancouver BC V6B 1S9 (604) 443-8300 www.vcc.bc.ca

Ontario

Technical Education and Training

Institution	Program	Description	Length	Method of Delivery	Contact Information
Ontario Agricultural College (University of Guelph)	Meat Industry Certificate	This certificate is a requirement for the Ontario meat industry's "Quality Accreditation (QA) Program". The 3 courses required for this certificate are: Meat Industry Basics Part I, Meat Industry Basics Part II, and Meat Technology.	Varies	Distance Education	University of Guelph Guelph, Ontario N1G 2W1 (519) 824-4120 www.uoguelph.ca
Ontario Agricultural College (University of Guelph)	Bachelor of Science, Food Science	Covers the technical and management side of the food industry in Ontario. The department works closely with industrial representatives to ensure that graduates are well prepared for	4 years	Classroom/lab/ co-op option	University of Guelph Guelph, Ontario N1G 2W1 (519) 824-4120 www.uoguelph.ca

		careers in every branch of the food processing industry as well as government and research positions.			

Institution	Program	Description	Length	Method of Delivery	Contact Information
Ontario Agricultural College (University of Guelph)	Certificate in Food Science	Comprised of five core course, Introduction to Food Chemistry, Introduction to Food Microbiology, Introduction to Food Processing, Introduction to Food Analysis, and Topics in Food Science, and two electives. Aimed at those working full-time who wish academic learning opportunities at the University level in Food Science.	1 year	Distance Education	Office of Open Learning, Johnston Hall, University of Guelph, Guelph, Ontario N1G 2W1 (519) 824-4120 www.uoguelph.ca

Non-accredited Education & Training

Saskatchewan

Institution	Program	Description	Length	Method of Delivery	Contact Information
North West Regional College	Process to Win	Helps to bridge the gap between producers of commodities and producers of processed products. Skill assessment, objectives, goal setting, and how to locate and access resources will all be covered.	6 days	Seminar	North West Regional College 1381 – 101 Street, North Battleford SK S9N 0Z9 (306) 937-5100 www.nwrc.sk.ca/business.html
POS Pilot Plant Corporation	Customized short courses	Topics include: ▪ Ingredient processing ▪ Product development ▪ Process development ▪ Nutraceutical extraction	Varies	Varies	POS Pilot Plant Corporation 118 Veterinary Road Saskatoon SK S7N 2R4 (306) 978-2800

		▪ Oilseed crushing & extraction ▪ Analytical method development ▪ On-site quality control & consulting			www.pos.ca For more information contact: Marilyn Huber at (306) 978-2855

Institution	Program	Description	Length	Method of Delivery	Contact Information
Saskatchewan Food Industry Development Centre (in partnership with Sask. Agriculture and Food)	Customized short courses	Food extension program offering food processing technical information and assistance. Course examples include: • Quality assurance • GMP's • CCP • On site training • Packaging/labeling • Microbiology	Seminars and short courses	Seminars and short courses	Food Centre 117 – 105 North Road University of Saskatchewan Saskatoon, SK www.agr.gov.sk.ca/safe/
University of Saskatchewan	Saskatchewan Food Product Innovation Program	Courses and workshops offered to meat industry.	Varies	Varies	University of Saskatchewan College of Agriculture 2D30 – 51 Campus Drive Saskatoon SK S7N 5A8 (306) 966-7881 www.usask.ca
Saskatchewan Food Processors Association	SFPA Workshops	Workshops offered in product packaging, quality issues, exporting, promotion, and product demonstration.	Workshop	Workshop	Saskatchewan Food Processors Association Suite 107-105 North Road Saskatoon SK S7N 4L5 (306) 683-2410 www.sfpa.sk.ca
Saskatchewan Indian Institute of	Management Skills Training for Frontline Staff	**Module I:** Management Training **Module II:** Planning & Organizational Skills Training	Each module is Approx.	See contact	SIIT is willing to customize a program specific to an employer, & are flexible in terms of training location. Training is offered

Technologies (SIIT)		**Module III:** Human Resources Management Training	60 hours		on site as well as off.

Institution	Program	Description	Length	Method of Delivery	Contact Information
United Food & Commercial Workers International Union	National Training Program Various courses offered	Topics include: ▪ Introduction to computers ▪ New member course ▪ Standard First Aid & Emergency Care ▪ Westfair Specific Steward course ▪ Speadsheets for Tax Time ▪ General Steward course	Courses varies from 3 – 36 hours in length	Varies	UFCW Local 1400 1526 Fletcher Road Saskatoon SK S7M 5M1 Contact: Cal Erikson (306) 384-5787
SIAST-Kelsy Campus and Pinetree Management Inc.	Management Skills Training for Frontline Staff	**Module I:** Supervision **Module II:** How to work with people **Module III:** How to get the work out **Module IV:** Employee selection, training & safety. Note: Module I is a prerequisite to all other modules in the program. The other modules may be taken in any order.	12 hours, and are offered as daytime seminars	Classroom seminar	SIAST Kelsey Campus John Cook, Training Consultant Community Services Extension Development Division P.O. 1520 Saskatoon SK S7K 3R5 (306) 933-8054 www.siast.sk.ca
U of S Extension	Various programs towards certificates, degrees, or personal or professional development	**Includes: agriculture, ecological education, horticulture, business & management, occupational health & safety, Prior Learning Assessment, and the Canadian Agriculture Lifetime Leadership program**	Varies from evening seminars to full-term classes	Classroom Seminar Distance education Televised Web-based	Extension Division Rm 104, Kirk Hall University of Saskatchewan 117 Science Place Saskatoon, SK S7N 5C8 (306) 966-5536 Sandra.Heighes@usask.ca (Dean's Secretary) http://www.extension.usask.ca/
Agriculture	Farm business	**Includes: succession planning,**	Varies	On line	AIMS

Institute of Management of Saskatchewan Inc.	management training	**farm accounting, customer service, the Internet and agriculture, environmental law, general business management, human resource management, market management**		Workshops Seminars Classroom	Walter Scott Building 125-3085 Albert Street Regina, Saskatchewan S4S 0B1 (306) 787 - 5997 aims@agr.gov.sk.ca www.agr.gov.sk.ca/aims/

Institution	Program	Description	Length	Method of Delivery	Contact Information
Business Development Bank of Canada	HACCP training & consulting	Assist companies to develop and implement their HACCP program.	40 hours training 100 hours on-site consulting	Workshops On-site consulting	135 - 21st Street East Saskatoon, Saskatchewan S7K-0B4 (306) 975-5369 http://www.bdc.ca/home/index.html

Manitoba

Institution	Program	Description	Length	Method of Delivery	Contact Information
Food Development Centre	Various	Topics include: • Preservation Technologies • Restructure Meat Products • HACCP • CDN/US Food Labeling • Extraneous Matter in Food • Food Safety & Crisis Communication • Food Sanitation • How to Start Your Agri Food Business • Agri Food Trade & Funding Opportunies • Nutraceuticals	Varies	Seminars	Food Development Centre Contact: Markus Schmulgen Business Development Co-ordinator P.O. Box 1240 810 Phillips Street Portage la Prairie Manitoba R1N 3J9 1-800-870-1044 www.fdc.mb.ca

Assiniboine Community College	FoodSafe	This course is must for owners, managers, supervisors, chefs, cooks, & all personnel responsible for purchasing, handling, preparing, and serving food. FoodSafe is a nationally recognized seminar.	1 day	Seminar	Assiniboine Community College Main Campus 1430 Victoria Avenue E. Brandon MB R7A 2A9 (204) 726-6600 www.assiniboinec.mb.ca

Ontaric

Institution	Program	Description	Length	Method of Delivery	Contact Information
Food Institute of Canada	Regulatory Workshop Series	Workshops on regulatory issues vary. Examples include: Emergency Response, Food Importation, Risk Analysis, Nutrition Labelling.	Workshops	Classroom	
Guelph Food Technology Centre	In-House Training Programs for areas in the food processing industry including: • Bakery • Confectionary • Dairy • Meat & Prepared Foods • Vegetable Processing	Examples of topics include: • Baking Technology for In-Store Bakeries • Chemistry of Donut Production • Chemistry of Sausage Making • Flatbread Technology • Frozen Dough Technology • Par-Baked Goods • Shelf-Life Extension of Baked Goods • Smokehouse Operation • Sugar, Icing & Filling for Bakers • Quality Control in the Baking Industry	Varies	In-House training program	Guelph Food Technology Centre 88 McGilvray Street Guelph, Ontario N1G 2W1 (519) 821-1246 www.gftc.ca/training/in-house.htm